Regulatory Strategy: 2013-2016

Consultation Document

7 April 2013

The Supreme Council of Information and Communication Technology "ictQATAR"

Comments in response are due by Sunday 5 May 2013

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1 Executive Summary

As part of its regulatory optimisation programme, the Regulatory Authority **("RA")** of ictQATAR is conducting a public consultation to obtain feedback from interested parties on its proposals for the strategic direction for its telecommunications regulatory activities (the "Regulatory Strategy").

The RA considers that the development of a focused strategy that is complimented by a targeted set of actions is an important next step in the development of the regulatory regime for ICT in Qatar. It is also important to signpost to all stakeholders the focus areas that the RA will pursue to develop the ICT market, improve competition and protect consumers.

To develop a high-level Regulatory Strategy for the next years, the RA has sought to:

- Review the regulatory strategies being pursued by telecoms regulators in selected markets;
- Understand the current performance of the ICT sector in Qatar;
- Understand the gaps in the current regulatory framework in Qatar;
- Identify the issues of importance to stakeholders and their views on RA performance;
- Identify the legislative requirements to which must be adhered;
- Align the Regulatory Strategy to the vision for ICT in Qatar (such as the those set out in Qatar's national vision for 2030 and Qatar's National ICT Plan); and
- Prioritise actions and identify where to focus the strategic objectives.

The proposed Regulatory Strategy takes into account the stage of market liberalization in the Qatar. In particular, RA acknowledges the Qatari Telecoms market was opened up relatively late compared to other countries in the GCC. While considerable progress has been made in introducing a world class regulatory regime in Qatar, the RA acknowledges that key elements of the regulatory regime are still to be introduced. Also, there is a lack of effective competition in some areas of the market which has meant consumers have faced higher prices and poorer quality of service. The RA has sought to specifically address these areas in developing its strategy.

The RA proposes 5 strategic priorities summarized in the table below.

Enhance the competitive environment	Improve the clarity and predictability of the regulatory framework	Ensure the efficient management of scarce resources	Safeguard the interests of consumers	Support Qatar in the transition to a connected digital economy
Where it is needed, RA will apply measures to enhance the sustainability and effectiveness of the competitive environment for ICT in Qatar. An enhanced competitive environment is a means to improved efficiency and innovation in the market.	RA will provide greater clarity to industry on how it will apply the regulatory framework in practice. This will involve increasing the transparency and consistency of RA decision-making, streamlining both the dispute resolution procedure for the industry and the process for appealing RA decisions.	RA will ensure that scarce public resources such as radio spectrum and numbering resources are managed efficiently.	RA will safeguard consumer interests by improving the quality of information to enable them to make informed choices while ensuring that service providers meet agreed levels of quality of service (QoS).	RA will assist industry in the development of standards for an IP world and ensure that regulations are 'fit for purpose' as the market evolves.

Across each of these areas, RA has identified a number of actions that, taken as a whole, provide a clear and structured plan to achieve the strategic objectives of the RA over the next years. The consultation paper provides details of this action plan as well as an indicative timeframe for each action over the next years.

Some of the areas to be pursued by the RA over the next years include:

- Introducing new service providers in the telecommunications market, at either the infrastructure or service level;
- The introduction of a wholesale interconnection and access framework (including a comprehensive Regulatory Accounting System);
- Improving the compliance and enforcement regimes to make the processes more effective and transparent, including plans to introduce powers for the RA to impose graduated sanctions;
- Streamlining RA dispute resolution procedures and reviewing the procedures for appealing RA decisions;
- Reviewing spectrum allocation and assignment policies and fees, including setting out future spectrum releases, introducing licence rules and regulations and ensuring monitoring of compliance;
- The release of a consumer policy that aims to improve quality of service and improve the quality of information available to enable consumers to make more informed choices in the market;
- Revamping of the Quality of Service (QoS) regulatory framework;
- Enacting a revised numbering plan and an associated numbering fees regime; and
- Developing required policies and regulatory frameworks to support Qatar's transition to a connected digital economy.

The achievement of this ambitious plan within the proposed timeframe will require constructive engagement between all industry players and interested stakeholders as well as coordination across other government departments and agencies.

RA seeks the views of industry and interested stakeholders on whether the strategic priorities identified are the right ones for Qatar and whether the action plan identified for each strategic priority areas is correctly identified. We urge all interested parties to actively participate in this important consultation.

2 Background and Introduction

As part of its regulatory optimisation programme, the Regulatory Authority is conducting a public consultation designed to set out proposed strategic directions for its telecommunications regulatory activities (the "**Regulatory Strategy**").

Regulators across varied industries globally face the common challenge of agreeing a small number of key, strategic objectives that allow them to focus on the 'things that matter'. The RA has reviewed the strategies developed by various national regulatory authorities (NRAs), including:

- Ofcom (UK)
- TRA (Bahrain)
- IDA (Singapore)
- ARCEP (France); and
- TRA (UAE).

Each of these NRAs has developed strategic plans that have been published. In addition, most of these NRAs have published detailed annual or multi-year forward work-programs that set out the work to be prioritised by the NRA.

Annex III summarizes the most recent strategies published by these NRAs and the specific prioritise actions relating to equivalent functions of RA.

Some of the strategic priorities reflect country specific factors and/or the legal remit of the NRA itself (for example, Ofcom has regulatory oversight over the broadcasting and postal industry in the UK). However, there is considerable overlap between the strategies and actions proposed by RA and those being pursued by leading regulators in other countries. In particular, there is a consistent focus across each of these NRAs on the following areas:

- Promoting competition,
- Protecting consumer rights, including ensuring adequate Quality of Service by service providers; and
- Ensuring the efficient allocation of scare public resources (such as spectrum).

The specific actions being pursued will differ across each NRA according to a range of country specific factors (such as the current stage of liberalisation, the effectiveness of the existing regulatory regime and the current and expected demand and supply trend in the market).

Regulators across industries globally face the common challenge of agreeing a small number of key, strategic objectives that allow them to focus on the 'things that matter'.

The Regulatory Gap Analysis project conducted in 2012 identified through a benchmarking exercise a number of leading National Regulatory Authorities (NRA). IctQATAR-Regulatory Authority ("RA") wants to develop a strategy that builds on the ICT vision for Qatar.

The Regulatory Strategy fits within the significant work already done to achieve ictQATAR 2015 ICT Plan[1] and the Qatar national vision for 2030[2]. It will support RA in achieving its aim of becoming a more efficient regulatory authority and meeting the legislative requirements set out in the Telecommunications Law No. (34) of 2006 ("Telecommunications Law") and the Telecommunications Executive By-Law No. (1) of 2009 ("By-Law"). The intention is to set out a strategy that will enable all stakeholders to understand the direction and objectives of RA.

To develop a high level Regulatory Strategy for the years ahead, RA has sought to:

- Understand the gaps in the current regulatory framework in the specific Qatari setting;
- Identify the issues of importance to stakeholders and their views on RA performance;
- Identify the legislative requirements to which must be adhered; and

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[1] Qatar's National ICT Plan 2015, Supreme Council of Information and Communication Technology (ictQATAR), 11th June 2011.
[2] Qatar National Vision 2030, General Secretariat For Development Planning (July 2008).

- Prioritise actions and identify where to focus the strategic objectives.

By setting out a Regulatory Strategy, RA aims to improve transparency around its areas of focus and also ensure that regulatory actions taken fit within this overarching strategy.

2.1 RA objectives

RA's Regulatory Strategy flows from the objectives set in Qatar's national vision for 2030[3] and Qatar's National ICT Plan[4] and the Strategic Sector Review.

Qatar's vision, ictQATAR 2015 plan and Strategic Sector Review

Qatar's national vision for 2030 is aimed at transforming the country. It is based on four development pillars human; social; economic and environmental. This vision defines the long-term outcomes for the country and provides a framework for developing a strategy and implementation plan to address current challenges while leveraging the opportunities brought by the recent exceptional economic progress of the country. Amongst various objectives, it seek to *"provide high quality services that respond to the needs and the desires of individuals and businesses"*, to create "a stimulating business climate capable of attracting foreign funds and technologies and of encouraging national investments" and "*a knowledge-based economy characterized by innovation; entrepreneurship; excellence in education; a world class infrastructure backbone; the efficient delivery of public services; and transparent and accountable government*".

More specifically, for the national ICT sector, ictQATAR has set out an ambitious vision for 2015, captured within Qatar's National ICT Plan: Advancing the Digital Agenda. As part of that vision ictQATAR has set out a commitment to ensure that Qatar fosters a legal and regulatory environment to encourage growth and investment.

The RA has a key role to play to achieve the following objectives:

- Contribute to the creation of a "*robust and ubiquitous infrastructure that enables high-speed broadband connectivity for all households and businesses*", with services "*affordable and set at competitive prices*".
- "*Modernize policies and regulations to protect the interests of end users, attract further investments, and create a business model to stimulate the development of digital content*".
- "*Foster competition and a sustainable ICT environment*". To that end, ictQATAR-RA shall, inter alia, "*eliminate barriers to competition in network services through open standards, interoperability and technology neutrality*" and "*carefully regulate*" spectrum planning and policy.

Liberalization steps

The main outcomes of the Strategic Sector Review, which was published in mid-2011, addressed the market structure.

ictQATAR is of the view that new licensees will benefit if a robust wholesale Interconnection and Access regime is in place, including Reference Interconnection and Access Offers.

RA is keen to introduce new services providers to the market and is exploring a range of options to open the market up further, including options for the introduction of new fixed and mobile service providers, either with or without coverage obligations.

For the fixed market, the entry of Qnbn at wholesale level, to provide an open access passive fibre network creates different regulatory challenges. It may be more efficient to license operators at the retail level rather than at wholesale level. Retail level competition (for example the licensing of FVNOs or Internet Service Providers) may lead to a greater diversity of service offerings for customers, while also offering price competition for the existing infrastructure operators.

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[3] Qatar National Vision 2030, General Secretariat For Development Planning (July 2008).

[4] Qatar's National ICT Plan 2015, Supreme Council of Information and Communication Technology (ictQATAR), 11th June 2011.

In the mobile market, RA considers that it is time to consider licensing a third mobile service provider. The lack of significant improvements in quality of service and the relatively static nature of market shares for the last 18 months suggests that a third service provider may be needed to spur the delivery of benefits of competition to consumers.

Given the very high mobile penetration in the country and the well acknowledged barriers in rolling out networks, it may be difficult for a third service provider to compete effectively against existing service providers. Hence, apart from the need to have a robust Access and Interconnection wholesale regulatory regime in place, there is an urgent need to lower barriers to entry. Additional measures could include a national roaming regulatory obligation (at appropriate non-discriminatory prices) on existing mobile service providers. Such an obligation would enable a new entrant to provide nationwide services while their network is rolled out.

The future hosting of several high-profile international events such as the 2022 World Cup in Qatar also presents challenges and opportunities for Qatar. In particular, the World Cup will require significant planning and upgrades to networks and improvements in international connectivity to deliver on the ICT commitments made as part of the successful bid.

As a result of these initiatives, the RA intends to optimise the telecoms regulatory framework in Qatar to foster a nation-wide connectivity to a large range of services with excellent quality of service at affordable rates.

In any case, the further licensing of service providers may lead to competition amongst industry players, more innovation in the market and better customer outcomes (in terms of higher quality, lower prices and innovative services). However, the potential benefits of new entry need to be balanced against the potential downsides as a result of inefficient market entry.

2.2 The current state of the telecommunications markets in Qatar

2.2.1 Introduction of competition in Qatar

Qatar's population has been growing steadily. It has now reached 1.8 million inhabitants[5].

Qatar's economy grew by 14.1% (real GDP growth) and the nominal GDP reached QR 631,609 million (US$ 173,281 million) representing an increase of 36% compared to the preceding year and, with a share of 3.5% of GDP, the telecommunication sector is also growing at a fast pace.

Qatar was the last country to open its markets in the GCC with the award of the second fixed license to Vodafone on June 2009. The following figure gives an overview of the award of second fixed (purple) and mobile (green) licenses over the years.

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[5] Source: Qatar Statistics Authority as per 31 Dec 2012.
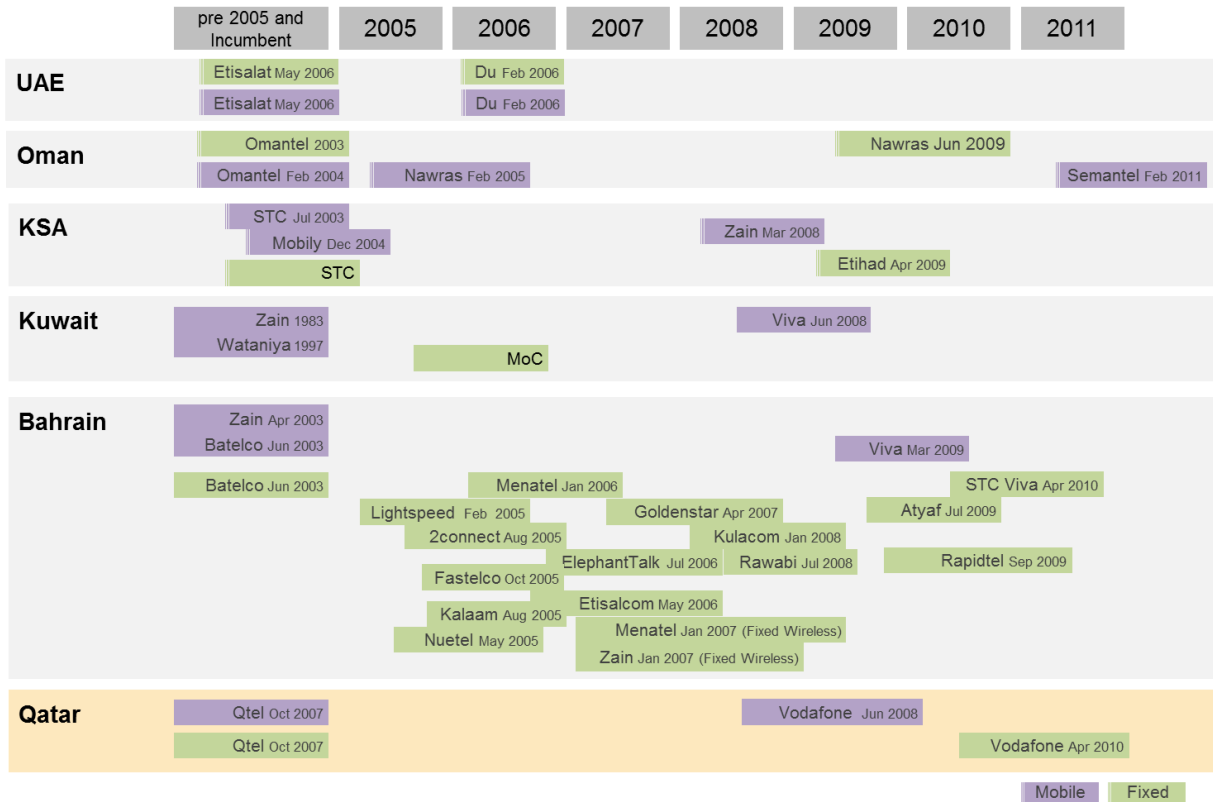
Figure 1　Market liberalisation in the GCC

The telecommunications sector continues to develop beyond the market for voice calls, with plans to expand broadband services through the Qatar National Broadband Network ("Qnbn") initiative, on which the Government will invest a total of $550 million, and the respective roll-out plans of Qatar Telecom Qtel Q.S.C. ("QTel") and Vodafone Qatar Q.S.C. ("Vodafone") as well as the licensing of new satellite operators.

In this context, despite falling price for voice services, since the start of competition in 2009, total revenue has been increasing. QTel's total profit and EBITDA are remaining at Q1/2008 level, i.e. pre-competition level and QTel's EBITDA margin is still over 50%.
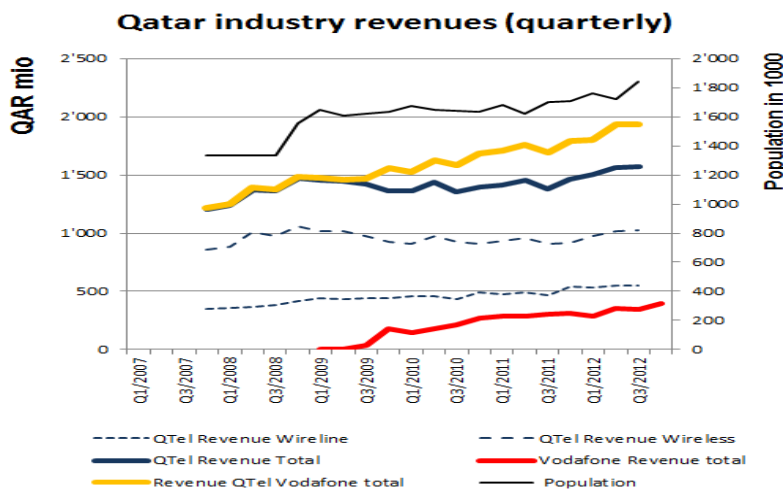
Figure 2　Development of the key financial figures (Source: Market reporting of the Service Providers)

2.2.2 Mobile markets

Qatar has currently two players in the mobile markets. The second mobile license was issued to Vodafone in June 2008 and it started operations in July 2009. Currently there are around 2.5[6] million active subscribers in Qatar, which gives a penetration rate of around 140%. More importantly than the supply side number is that nearly every person in Qatar who wishes to have a mobile connection has already a subscription. Arguably Qatar has reached full mobile penetration.

Besides, a significant part of the population has subscriptions from both operators to avail of the relevant promotions and features of the specific operator.

In the mobile markets competition developed in national calls, International Direct Dialing – "IDD" and mobile data.

The development of revenue market shares is depicted in Figure 3 below.
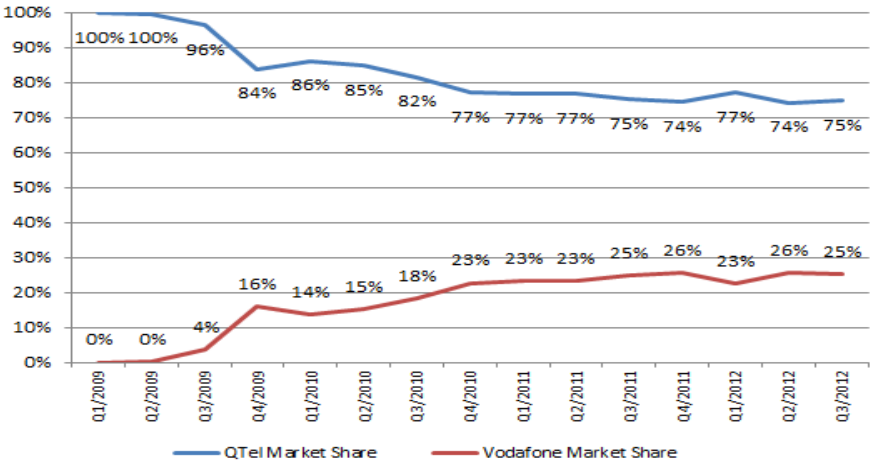

Figure 3   Mobile – Mobile market share (based on revenue) – Evolution (Source: Service Provider public reporting)

At the beginning of its market entry, Vodafone gained market share rapidly (+43% yoy in 2010). However, Vodafone's market share is close to flat lining since Q2/2010, at around 23%.

Vodafone has introduced its postpaid offers on 18 June 2012. It remains to be seen whether Vodafone will be able to make significant gains in market share in the near future.

Mobile broadband has also recently grown significantly, with a 150% increase in the number of customers (from approximately 78,000 to 279,000) between Q1 2011 and Q3 2012. 4G will provide increased broadband speeds to meet the demands of users and support access to a variety of content over mobile networks, which ought to increase customers demand for data services. Such 4G offers are expected to be launched soon. To that regards, QTel announced a commercial launch in 2013 when Vodafone, who also offers high speed mobile broadband, has not provided as yet details of its timing.

In their mobile Strength – Weakness – Opportunities – Threat (**SWOT**) analysis BMI sees opportunities through increased competition, resulting in a greater choice of services. The main threats are eroding prices and a saturated market.

Strengths	**Weaknesses**
• Mobile market growth is supported by positive macro indicators in its domestic market: strong population and economic growth. • One of the highest mobile average revenue per user (ARPU) in the region. • Qtel is a fully integrated operator, allowing synergies	• Saturated mobile market in Qatar offering limited growth prospects. • Qtel is internationally present, for the most part, in relatively small markets. This limits medium- to long-term growth prospects. • Mobile ARPU declined in 2009 and 2010, although

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[6] SP reporting to ictQATAR

and customer loyalty across business divisions (fixed, mobile and internet).	ARPU periodically picked up.

Opportunities	Threats
• Development of mobile competition would give consumers a greater choice of services and price ranges. • Deployment of HSDPA and the introduction of new multimedia smartphones is stimulating demand for mobile internet services. This should generate more opportunities for content providers. • Opportunities exist for Qtel and Vodafone to compete in the market for converged services.	• As mobile competition increases, this could lead to a price war and lower service ARPUs for both operators. • Qtel's international expansion efforts may be undermined by strong competition in the region for the acquisition of greenfield licenses and/or existing operations. • Danger that new entrants, including MVNOs, would make little headway in a market already nearing saturation point.

Figure 4   Qatar mobile SWOT[7]

The mobile market represents a vested duopoly, with rather stable market shares for the last 10 quarters. International best practice but also widespread practices in the GCC express clearly those benefits of competition starts with at least three players. ictQATAR – RA is therefore contemplating proposing the introduction of new market players.

2.2.3   Fixed market

Fixed voice

Qtel is currently the principal service provider of fixed line voice services in Qatar, with over 318,000 subscribers (as of the 3rd quarter of 2012). Vodafone was awarded a public fixed licence in April 2010. Vodafone's fixed voice service offerings are currently restricted to very small parts of the country, namely mostly residential services in The Pearl Qatar and Barwa City.

Fixed Broadband

Qtel and Vodafone are the current service providers in the national broadband market, which has over 180,000 fixed subscribers.

The market continues to grow, with Qtel expanding its fibre network by adding to its existing 20'000 fibre connections. It is aiming for 100%[8] fixed broadband coverage by 2014. Vodafone expanded operations outside of The Pearl Qatar development towards Barwa City and West Bay. Broadband infrastructure improvements in Qatar are also being driven by Qnbn. It has set out plans to build an open access fibre wholesale network reaching 95%[9] coverage by 2015 and to offer wholesale services to the service providers.

The weakness in the fixed sector focusses on the monopolistic situation in the market, which leads to high prices for consumers. BMI also refers to the absence of Local Loop Unbundling (**LLU**), a key ingredient in a wholesale regime.

Strengths	Weaknesses
• Vodafone Qatar licensed to provide fixed voice and internet services, bringing competition to the market. • Unlike other countries in the region, the number of traditional fixed lines continues to grow. • Strong demand for broadband internet and prepaid dial-up services. • ARPU rates are high by regional standards.	• Although wireline competition has been licensed, Qtel continues to have a monopoly over the provision of fixed voice and internet access services. • Local loop unbundling has yet to be introduced. • Fixed broadband services, particularly ADSL services, have traditionally been expensive. This is a reflection of the limited competition that existed in the sector.

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[7] BMI QATAR Telecommunications Report Q4 2012
[8] Percentage of premises
[9] Percentage of premises

Opportunities	Threats
• Mobile broadband services have taken off and are providing an important source of competition to fixed broadband alternatives. • Triple-play and quadruple-play services are an important means by which strong rates of internet and fixed-line growth have been maintained. • The sale of the government's stake in Qtel to a strategic investor could attract additional investment to the telecoms market. • Investment in FTTH could drive higher value data services.	• Danger that competition could lower high ARPU rates. • . A sudden decline in the use of traditional fixed-line services could have a negative impact on the growth of ADSL broadband services. • Growth in demand for mobile broadband services could adversely affect demand for fixed broadband services.

Figure 5   Qatar fixed SWOT[10]

With very limited rollout by Qnbn and nearly no rollout by Vodafone, QTel's position is that of a near monopoly with the absence of meaningful competition in the market.

Question 1	Which other main areas should ictQATAR take into account when analysing the telecommuncation markets on a high level? What are the potential areas of improvments? Are there any other services that may be needed in preparation for the 2022 milestone?

2.3 The current regulatory regime

Qatar's telecommunications sector began to liberalize immediately after the enactment of the Telecommunications Law in 2006, which was followed by its Executive By-Law in 2009.

The Telecommunications Law (Article 2) sets out the following objectives that ictQATAR shall achieve, in its capacity as the supreme authority responsible for regulating the telecommunications sector:

1. promoting the telecommunications sector in order to consolidate national, social and economic development;
2. enhancing the telecommunications sector's performance in the State of Qatar through encouraging competition and fostering use of telecommunications services;
3. encouraging the introduction of advanced and innovative information and telecommunications technologies to meet the needs of customers and the public;
4. increasing customers' benefits and safeguarding their interests;
5. encouraging sustainable investment in the telecommunications sector;
6. relying, where possible, on market forces to safeguard the interests of customers and the public;
7. identifying and addressing anti-competitive practices in the telecommunications sector;
8. establishing a fair, objective and transparent licensing regime for service providers;
9. establishing a fair regime that meets the requirements of the competitive marketplace through the implementation of interconnection between service providers and all procedures related thereto;
10. promoting universal service;
11. establishing an effective approval regime for telecommunications equipment;
12. ensuring that the regulation of the telecommunications sector remains in line with international rules; and
13. ensuring the orderly development and regulation of the telecommunications sector.

RA has already made considerable progress in achieving these objectives, including:

• Issuance of fixed and mobile licenses to the incumbent operator (Qtel) in 2007;
• Introduction of competition in the mobile market in 2008 (Vodafone Qatar) and in the fixed market in 2010 (Vodafone Qatar);
• Issuance of three individual licenses to QSAT Communications, RigNet Qatar, and Harris Salam in 2010 and 2012 for the provision of VSAT networks and services to Closed User Groups;

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[10] BMI QATAR Telecommunications Report Q4 2012

- Issuance of a license for the provision of Wholesale Fixed Telecommunications Networks to United Development Company (UDC) in 2010;
- Issuance of a license for the provision of Passive Fixed Telecommunications Networks to Qnbn in 2012;
- Issuance of a number of class licenses;
- Definition of relevant markets and dominance designation in 2008 and 2012;
- Strategic Sector Review in 2011; and
- Issuance of a large number of policies, guidelines, orders, instructions and other regulatory instruments to meet current and future market needs.

A comprehensive list of the Applicable Regulatory Framework is included at Annex IV.

The Strategic Sector Review[11] assessed the state of competition in the telecoms sector and RA made a number of recommendations to promote the sustainable future development of the Qatari telecommunications market.

In the mobile market, RA recommended:
- a future review to decide whether to introduce a new mobile licensed operator;
- revisions to the tariff approval process to make it more efficient;
- periodic publication of quality of service results; and
- continuing support to Qtel and Vodafone in gaining access to rights of way and civil infrastructure to support faster network rollout.

In the fixed market, RA recommended:
- the implementation of the Qnbn initiative; and
- starting procedures for the introduction of a new fixed service-based provider.

RA acknowledges that these recommendations are yet to be completely implemented. Further progress is needed across a number of areas to develop the regulatory regime and deliver the ambitious vision for the ICT sector. The strategic approach the RA now intends to take and the proposed regulatory actions are set out in this consultation document.

2.4 Identified gaps

In 2012, RA conducted a "Gap analysis" in order to assess its effectiveness and performance, its weaknesses and margin of progress. As summarized in the two charts below, several issues were to be dealt with in order to fill existing gaps to compare with leading NRAs worldwide.

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[11] Published on 7th July 2011, http://www.ictqatar.qa/sites/default/files/documents/Strategic%20Sector_Review.pdf
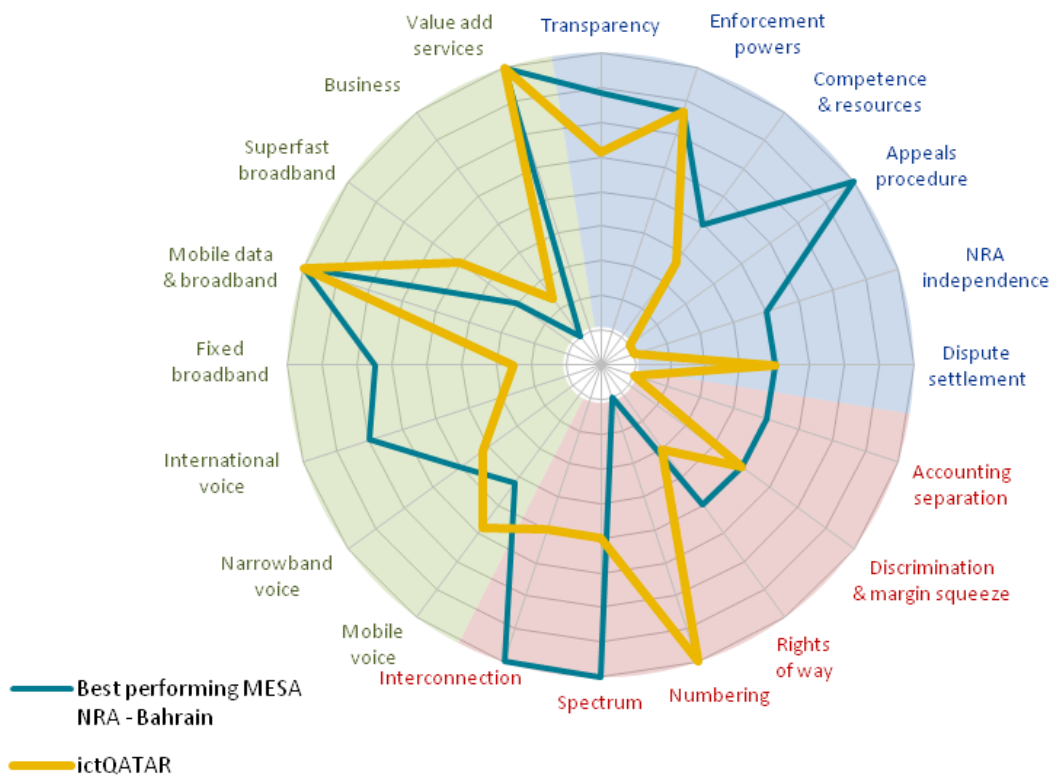
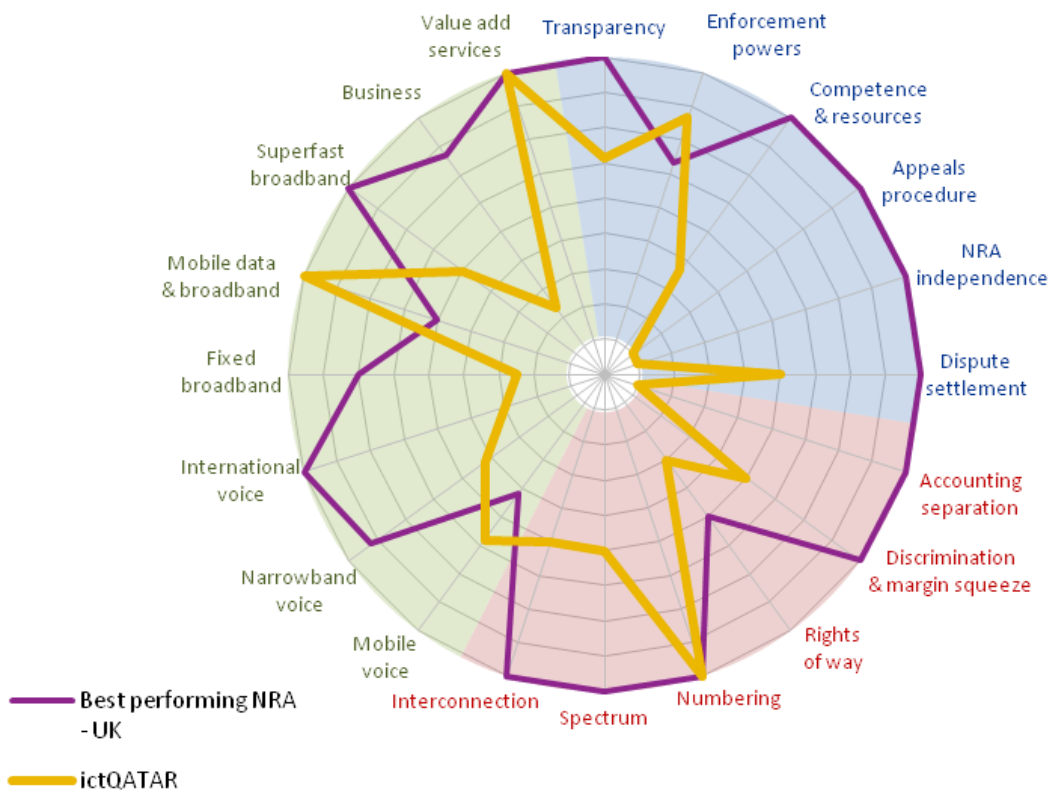Figure 6   Performance of RA compared to TRA - Bahrain

Figure 7   Performance of RA compared to Ofcom - UK

Issues like competence and resources, independence, enforcement powers or rights of way are on-going processes on which RA has to deal with on a day to day basis, within the limits of the current legal framework. However, RA may focus on a few issues allowing significant improvements of the regulatory framework.

In addition to the issues discussed earlier, RA may need to conduct analysis and issue appropriate regulatory instruments (e.g., policies, guidelines, instructions, etc.) on a range of other emerging regulatory issues; including:

- Regulatory issues concerned with the convergence of fixed, mobile and content services;
- The impact of net neutrality on the telecoms market in Qatar;
- IT security and cyber-crime; and
- Global and regional regulatory initiatives (such as ITU matters and international roaming).
- Net neutrality.

The extent to which these will be important or otherwise will depend crucially on how the market develops over the coming years. RA has attempted to identify the key issues in this consultation – but acknowledge that it is not always possible to identify all of the issues that may need its attention.

3 Key Strategic Priorities

RA proposes five key strategic regulatory themes, with associated actions, to drive its agenda over the next years. These have been built on the vision for the sector and the recently conducted gap analysis

The existing regulatory framework was examined and benchmarked against selected regional and international countries to understand where improvements could be made. Interviews were also conducted with internal and external stakeholders to enable RA to understand key issues and concerns. This work provided key insights into how the regulatory framework could be improved. Specific findings from the gap analysis review are referred to, where relevant, under each of the strategic priorities.

The exhibit below shows how RA has developed its proposed strategy. This recognises that RA needs to prioritise its work based on its own capacity and the capacity of the industry to implement what is needed.
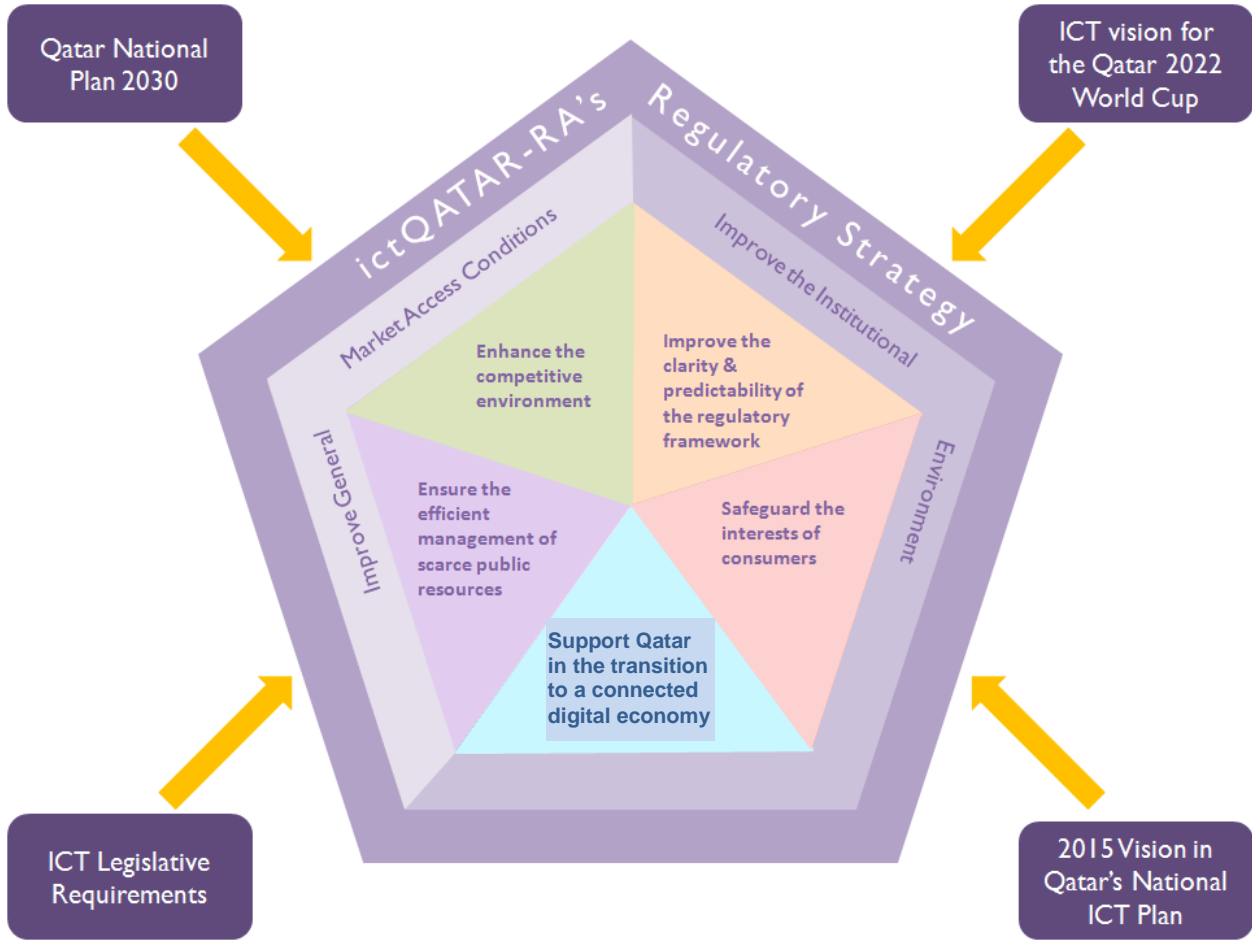
Figure 8   Proposed Regulatory Strategy

3.1 Proposed strategic priorities

The proposed areas of RA primary focus will frame the work over the coming years and underpin the specific work programme each year.

To that end, RA intends to set 5 set of priorities for its upcoming activities:

- Enhance the competitive environment (3.2)
- Improve the clarity and predictability of the regulatory framework (3.3)
- Ensure the efficient management of scarce resources (3.4)
- Safeguard the interests of the consumers (3.5)

- Support Qatar in the transition to a connected digital economy (3.6)

Enhance the competitive environment	Improve the clarity and predictability of the regulatory framework	Ensure the efficient management of scarce resources	Safeguard the interests of consumers	Support Qatar in the transition to a connected digital economy
Where it is needed, RA will apply regulations to enhance the sustainability and effectiveness of the competitive environment for ICT in Qatar. An enhanced competitive environment is a means to improved efficiency and innovation in the market.	RA will provide greater clarity to industry on how it will apply the regulatory framework in practice. This will involve increasing the transparency and consistency of RA decision-making, streamlining both the dispute resolution procedure for the industry and the process for appealing RA decisions.	RA will ensure that scarce public resources such as radio spectrum and numbering resources are managed efficiently.	RA will safeguard consumer interests by improving the quality of information to enable them to make informed choices while ensuring that service providers meet agreed levels of quality of service (QoS).	RA will assist industry in the development of standards for an IP world and ensure that regulations are 'fit for purpose' as the market evolves.

Figure 9   Key Strategic Priorities

Question 2   Do stakeholders agree that these are the appropriate strategic priorities for the RA? If not, please specify and provide rationale.

3.2 Enhancing the competitive environment

Establishing an effective and sustainable competitive environment in Qatar's ICT market is a key priority. As set of in the 2015 National ICT Plan, RA is committed to ensuring that Qatar fosters a legal and regulatory environment that encourages growth and investment. The ICT regulatory framework will be designed to stimulate investment and lower market barriers.

A summary of the proposed actions under this strategic priority is summarised below.

Enhancing the competitive environment

An enhanced competitive environment is a means to improved efficiency and innovation in the market.
RA will address this with the following actions:

- Introduction of a robust wholesale interconnection and access framework

- Introducing new service providers in the telecom market

- Reducing the barriers that customers face in switching operators

- Reducing barriers to the building of networks

Figure 10 Enhancing the competitive environment

The Government of Qatar has developed a legal framework that constitutes the basis for creating a competitive sector in the economy (see section 2.3). RA has already developed new policies and

implemented guidelines designed to help create an open ICT sector. For example, it has issued a licence to Qnbn, prepared satellite licences and also issued a number of Class Licences.[12] The competition created by market liberalisation has already yielded benefits to consumers and businesses in Qatar. Prices for mobile and fixed services have dropped, and the ICT contribution to GDP increased from 1.2% in 2008 to 1.6% in 2011.

Further benefits can be achieved through regulatory measures designed to enhance the competitive environment. In general, competition increases efficiency and drives prices towards costs. Enhancing the competitive environment in Qatar should drive investment and innovation in the market. The increased competitive pressures should also deliver quality of service improvements to the benefit of consumers.

| Question 3 | Are there any additional priority actions that RA should be considering for the coming years to enhance the competitive environment? |
| Question 4 | What are the key challenges in terms of enabling competition in the market and how far do stakeholders agree that these priorities will address them? |

3.2.1 Introducing a robust wholesale interconnection and access framework

A major gap in the current regime is an overarching framework to guide the regulatory approach to Interconnection and Access. In particular, there is an urgent need for Reference Offers to be developed for access and interconnection services provided by Dominant Service Providers. As there is currently no comprehensive framework, access and interconnection between service providers have been achieved through bilateral commercial agreements.

RA has already started the work needed to introduce a robust wholesale interconnection and access regulatory framework and this work will extend into 2013. The key tasks are:

- a overarching policy for wholesale access
- a requirement for Dominant Service Providers to produce Reference Offers ("ROs") for selected Access and Interconnection services; and
- a regulatory instrument to guide the infrastructure rollout in new developments, especially those on a very large scale (Megaprojects)

In parallel, QTel is further developing its Regulatory Accounting System ("RAS"). The RAS contains a set of systems, processes, rules and procedures which, inter alia, enables QTel to establish a record keeping regime necessary to meet its regulatory obligations and which keeps track of and reports on revenues, costs, assets and capital employed.

The RAS is a tool that supports other investigations and helps with the implementation of informed decisions. The RAS is required to give a solid platform that gives insights and information on products and business units but, on its own, the RAS is not a full solution to any regulatory decision. The RAS gives transparency, both to ictQATAR and the industry of the status of products' costs and profits. This gives confidence that prices are reasonable and that markets are not distorted, or else it allows issues to be identified and investigated. In this case the RAS can be further investigated and used in other analysis and investigation work.

The further development of a RAS for the next years will allow RA to develop its policies around access and interconnection pricing. It will also provide the basis for retail price regulation. ictQATAR is mindful that that under the current cost standard (fully distributed cost) and cost base (historical cost accounting) the RAS results are not in all cases immediately useable for retail tariff approval. This will be resolved with intermediary steps.

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[12] Class Licenses allow persons importing, selling or using certain types of devices or telecommunications equipment for commercial purposes no longer have to apply to RA for a license to do so. They will have to apply for Type Approval and obtain a Dealer's License if they are authorized by RA to deal with telecommunications equipment. A list of the Class Licenses that have been issued by RA are outlined in Annex IV.

The introduction of ROs and the guiding principles for interconnection, access regulation and access to infrastructure of private developers will also enhance the competitive environment by:

- providing increased legal certainty in the market;
- helping avoid or reduce disputes between service providers as negotiations will be focused on a smaller set of technical and commercial issues;
- allowing for the faster introduction of competition; and
- providing improved regulatory transparency.

Question 5	Do stakeholders agree that the measures outlined will improve the competitive environment and should be a strategic priority for the RA?
Question 6	Are there any additional actions that the RA should be considering to support the introduction of a robust framework for wholesale interconnection and access? Please specify and provide the justification/rationale.
Question 7	Are there any additional actions that the RA should be considering in regard to the deployment of infrastrucure in new developments projects (e.g., Lusail, New Doha International Airport, stadiums, railroad and metro networks and stations, etc)? ictQATAR is mindful that the current main mode of infrastructure rollout is GPON, which can currently not be unbundled on the passive layer. Do stakeholders see the need for ictQATAR to develop infrastructure guidelines to govern the rollout on the passive layer?

3.2.2   Liberalisation steps

At present there are two licensed service providers in the mobile market and two in the fixed market (Qtel and Vodafone have both fixed and mobile licences). In addition, Qnbn has a licence to provide passive wholesale services on an open access fibre network.[13] ictQATAR is of the opinion that competition in the mobile market has started to benefit consumers in terms of service availability, price reduction and service innovation. However, quality of service remains an issue and improvements are needed. Besides, more can be done to enhance the competitive environment and liberalise the market further in the interest of the customers.

Breaking the duopoly through introduction of new entrants in the fixed and mobile markets has the potential to lead to a 'step-change' in the intensity of competition. ictQATAR has already taken steps to introduce competition, for example through the introduction of Vodafone to the market and the Qnbn initiative.

RA plans to introduce new players in the market and will consider a range of options to achieve this in the most appropriate manner.

Further competition could be introduced at either the infrastructure or service level. RA will need to consider the relative merits of each in the fixed and mobile markets to find an appropriate balance for introducing more competition in the telecom sector Qatar.

The extent to which the entry of service level providers will enhance the competitive environment depends on a number of factors. It relies on sufficient infrastructure already being in place and also having a well-functioning regulatory regime, including a wholesale access framework and alleviated customer barriers.

Introducing infrastructure level competition, while involving significant levels of capital investment, can stimulate innovation as it provides stronger incentives for infrastructure owners to continuously upgrade their networks and to invest in the most up to date technology. It can increase the ability of service providers to differentiate their services and provide stronger competitive environment but places additional burdens on rights of way and access to existing passive infrastructure.

Question 8	What are the key elements that the RA needs to ensure are in place before new entrants can be introduced?

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[13] The full list of individual Licenses can be found in
http://www.ictqatar.qa/sites/default/files/documents/RA_Annual_Report_2011_EN_1.pdf

Question 9	What form/type of market structure do stakeholders consider most appropriate? How would it be achieved?

3.2.3   Reducing barriers to building infrastructures

Ensuring that service providers are able to build their network infrastructure in the optimal locations, for example through site sharing and granting rights of way, is a key facilitator to competition in the market. Infrastructure competition provides a critical avenue for service providers to compete effectively against each other. Owning network infrastructure provides flexibility to service providers in terms of prices, quality and service propositions.

Service providers have indicated that limits of rights of way to existing infrastructure have impeded the development of the fixed and mobile networks in Qatar and dulled the intensity of competition. It has also made it difficult for service providers to meet quality of service licence obligations. While provisions are in place in the Telecommunications Law covering access to property, site sharing and rights of way, obstacles remain.

RA sees reducing barriers to building networks as an important priority to help enhance the competitive environment. It will support existing service providers in expanding and being able to effectively compete and should also reduce barriers for potential new entrants. This has the potential to drive improvements in quality of service and service provision.

RA foresees a range of actions that could assist in achieving this goal, including the introduction of policies, guidelines, or other regulatory instruments covering:

- passive and active infrastructure sharing;
- access to road corridors;
- site approval processes;
- installation of equipment;
- use and assignment of government owned land;
- access to infrastructure owned by private developers; and
- rights of way.

RA recognises, however, that options to lower barriers to building networks will need to be coordinated with a range of parties across Qatari government entities.

Question 10	What are the key issues for RA to consider in reducing the barriers to building infrastructure? Please support your answers with specific examples.
Question 11	Do stakeholders agree that reducing such barriers to building infrastructure should be a strategic priority for RA? What are the key obstacles to be overcome to achieving this?

3.2.4   Reducing customer barriers

In the telecoms market, customers face a range of costs in switching from their current service provider to an alternative service provider. These costs can include those involved in searching for a new provider and contract, exit fees from contractual obligations and the costs involved in changing a telephone number. High customer switching costs can dull the intensity of competition by increasing the barriers to customers changing service providers. They can also reduce the incentives on service providers to innovate and invest to try to attract new customers or retain existing customers.

Regulators can introduce a range of measures to lower the barriers to customers and so enhance the competitive dynamics in the market. For instance, restrictions can be placed on maximum contract lengths to avoid customers being tied in for long periods of time or on loyalty plans. Number portability is often used also as a mean of to increase the intensity of competition in the market in removing a barrier to switching from one operator to another. Mobile Number Portability ("MNP") has been introduced since February 2013 as required by the Telecommunications Law. Work on Fixed number portability may have to start soon.

MNP is just one of a number of measures that can impact on the barriers to customers. The RA will also consider what other measures are warranted to achieve this strategic objective. This may include a review of the current commercial arrangements in the market regarding customer contract lengths and existing retention strategies. In addition, the RA recognises the importance of providing customers with clear and transparent information on the switching process.

Question 12	Are there any measures, in addition to number portability, that the RA should introduce to reduce customer barriers over the next years (e.g., SIM cards prices, prepaid credit regulation, regulation of winback, retention plans, inertia selling, slamming, etc.)?

3.3 Improving the clarity and predictability of the regulatory framework

As part of the gap analysis work conducted earlier in 2012, stakeholders raised a number of concerns in relation to the clarity and predictability of the framework. Decision-making by the RA was not thought to be transparent or always consistent and lacked an effective and independent appeals process for RA decisions. To address these concerns, the RA proposes to implement a number of initiatives to improve the clarity and predictability of the regulatory framework. A summary of the proposed actions under this strategic priority is summarised in the exhibit below.

Improving the clarity and predictability of the regulatory framework

RA will provide greater clarity to industry on how it will apply the regulatory framework in practice. RA will take the following actions:

- Develop and publish guidelines on retail and wholesale price regulation;

- Publish enforcement policy and procedures;

- Streamline existing dispute resolution procedures;

- Review arbitration processes for stakeholders to appeal RA decisions;

- Review licenses and develop a framework for licensing of satellite networks and service providers; and

- Develop and publish a competition policy.

Figure 11 Improving the clarity and predictability of the regulatory framework

Question 13	Do stakeholders agree that the actions outlined will help improve the clarity and predictability of the regulatory framework and address any concerns you have in this area?
Question 14	Are there any additional priority actions the RA should be considering to improve the clarity and predictability of the regulatory framework?

3.3.1   Compliance and enforcement

RA proposes to improve both the compliance and enforcement regimes. Its intention is to make the processes more effective and to give greater certainty to industry about how it will act when service providers are found to be non-compliant.

Stakeholders have expressed views that RA currently has only very limited scope to ensure that service providers are compliant with regulation and enforce their obligations as, while its ability to impose fines is in place, it has proved impractical with any fines being referred to Office of Public Prosecution. Furthermore, in its gap analysis of the performance of the regulatory framework, stakeholders indicated that they considered RA lacked the power to impose a graduated set of sanctions to address non-compliance.

Question 15	There is no general mechanism allowing RA to fine non-compliant service providers. Would stakeholders think such general enforcement power beneficial to the market? On a more general basis, do stakeholders agree that compliance and the enforcement capabilities of the RA should be improved? Please provide a justification for your answer.
Question 16	Do stakeholders agree that a graduated sanction mecanism would be beneficial and what issues do you think the RA needs to consider when developing its enforcement regime?

3.3.2   Streamlining RA dispute resolution procedures

The lack of relevant resources generates delays in resolving commercial disputes hamper industry development and damper dynamic efficiency.

Besides, RA plans to review its existing disputes handling processes and procedures and to make changes, where required, to create an effective and predictable process. RA will develop and publish guidelines to give stakeholders greater certainty about the process. RA will also consider industry-led processes such as self-regulation, industry codes and alternative dispute resolution processes and procedures. The RA will consider also methods for resolving disputes outside of the official judicial mechanisms, such as streamlined arbitration procedures (described in detail below) and mediation[14].

Question 17	Do stakeholders agree that the dispute resolution procedures need to be streamlined and enhanced?

3.3.3   Review procedures to appeal RA decisions

A streamlined arbitration process could introduce an important 'check and balance' into the regulatory regime, providing clarity on the scope of powers and an opportunity for RA decisions and disputes between service providers to be tested by an independent arbitration body.

At present, the appeals procedure involves going through the administrative courts. Introducing an effective 'fast-track' procedure for appealing RA decisions is likely to have a number of important benefits. However, it will be important to strike the right balance to ensure that the regime does not allow parties to unnecessarily delay the introduction of regulatory obligations through frivolous appeals. RA will consider how to review the appeals process to achieve this balance and provide greater clarity and predictability of the regulatory framework.

Question 18	Do stakeholders agree that the RA should consider introducing new procedures for appealing its decisions and why?

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[14] Mediation typically involves a third party 'mediator', who facilitates the resolution process but does not impose a resolution on the parties.

3.3.4   Competition policy

A common feature of regulatory regimes in other countries is the production of a document that clearly sets out the approach to the implementation of Competition Policy "The rules of Competition" on how anti-competitive behaviour will be assessed and dealt with.

The Qatari ARF contains basic rules for collusion, abuse of a dominant position and concentrations. As competition is in its infancy these basic rules serve well.

In moving forward and expecting more competition and ex-post competition cases, the lack of a formal, comprehensive and coherent approach to (ex-post) competition regulation can result in an inability to deal with competition-related issues that arise and create uncertainty in the market as to how service providers are expected to act.

In the absence of a dedicated Competition Authority, the RA will face an increased number of ex-post competition cases in the telecommunication sector. Therefore the RA sees benefits in setting out clearly its competition policy for the telecoms sector in Qatar. These include greater clarity and predictability for service providers by clearly setting out the 'rules of the game'. These will cover areas like collusion, anti-competitive agreements, exploitative and exclusionary abuses and concentrations in more detail.

Question 19	What issues should be covered in the competition policy that RA is planning to develop? Stakeholders are also invited to comment on the timeline of implementation.

3.3.5   Remedies to address market dominance

RA has already undertaken Market Definition and Dominance Designation reviews in 2008 and 2011. For further actions in this regards, RA will closely monitor, inter alia:

- the evolution of revenue market shares and traffic market shares;
- the evolution of prices at wholesale and retail level;
- the ability of each service provider to act independently from its competitors and/or from its customers and/or from its service providers at wholesale level; and
- each service providers financial results over a period of time.

Question 20	Do stakeholders agree that the RA needs additional tools or mechanisms, as the market is developing? Please provide justifications for your answer.

3.3.6   Retail and wholesale price regulation

RA proposes to develop further instruments on its approach to retail and wholesale price regulations, including publishing tariff approval guidelines. This will provide greater clarity on the approach that RA will take when deciding on the form of price regulation in retail and wholesale markets. It will also provide greater certainty to service providers on the price approval process and its decisions.

Clearly setting out the retail price regulation process could foster innovation in the market, for instance, if prices for certain services are pre-approved. Furthermore, ensuring that service providers are clear about the way RA will regulate retail and wholesale prices should allow service providers to set prices in accordance with this and should help avoid delays in any pricing approvals. RA expects to produce the required regulatory instruments (e.g. policies, guidelines, instructions) in 2013 and 2014.

Question 21	In this context, do stakeholders agree that the development of further policies, guidelines and instructions on retail and wholesale price regulations will help RA to fulfill its role and will deliver benefits to the market? Please provide a justification for your answer.

3.3.7   Reviewing licences

Over the course of 2014/15, RA plans to investigate the potential benefits of reviewing the existing licences to simplify them by moving a number of obligations from the licences to general and separate regulatory framework documents. New licenses will also follow this revised license structure.

For instance, RA may:
- issue a class licence, stating relevant obligations for any and all service providers,
- establish a specific list of requirements and/or obligations to deliver voice telephony services to the public,
- specify dominant service provider obligations in the by-laws and/or in a dedicated legal instrument,
- delete redundant aspects from the licenses, etc.

This should serve to increase transparency and improve clarity regarding the obligations licensed service providers face.

RA will also consider whether unified licensing should be introduced. RA believes that such reforms would allow greater flexibility for service providers to offer service bundles and offer more innovative solutions. Under a unified license regime, existing and future service providers would be authorised both to provide both fixed and mobile services, however, the provision of services requiring access to radio spectrum would still be subject to separate spectrum licensing and holding a unified license would not necessarily guarantee access to radio spectrum.

In addition, RA is currently working on developing a framework for licensing of satellite networks and service providers. RA may also consider extending the scope of technology neutrality in relation to radio spectrum use. This may be particularly beneficial when new entrants are introduced to the market.

Any changes to the licensing regime, however, will require RA first to have a comprehensive regulatory framework in place. This will need to cover a number of key issues such as interconnection and access, tariffs and spectrum allocations.

Question 22	Do stakeholders agree that the proposed actions will deliver benefits to the market? Is the proposed timing appropriate and are there any additional actions that should be considered? Please provide justifications for your response.

3.4 Ensuring the efficient management of scarce public resources

RA recognises the importance of ensuring that scarce public resources are managed efficiently. Under this strategic priority, RA will improve its capabilities in the efficient management of spectrum and numbering. A summary of the proposed actions under this strategic theme is shown in the exhibit below.

Ensuring the efficient management of scarce public resources

RA will ensure that radio spectrum and numbering resources, which are scarce public resources, are managed efficiently.

RA will achieve this with the following actions:

- Review spectrum allocation and assignment policies and spectrum fees

- Implement advanced spectrum monitoring systems

- Establish the Qatar National Spectrum Coordination Committee (QNSCC)

- Enact a revised numbering plan and an associated numbering fees regime

Figure 12 Ensuring the efficient management of scarce public resources

3.4.1   Review spectrum allocation and assignment policies and spectrum fees

The role of RA is to balance public and commercial interests in determining allocation and assignment of access to the spectrum. RA considers that a clear and predictable policy on spectrum planning and pricing is a critical element of an effective regulatory framework. Demand for mobile data is growing at a fast rate. Policies to ensure the efficient planning and pricing of spectrum will be beneficial to the long term economic growth of the country. A spectrum policy should aim to improve the efficiency of spectrum management so that spectrum can be made available for new technologies and new entrants in a timely and efficient manner.

RA developed and published a Radio Spectrum Policy in March 2012[15]. It covers the following areas:

- Policy principles;
- Spectrum Allocation;
- Frequency Assignment;
- Radio Spectrum Licensing;
- Radio Spectrum Assignment Policy, Fees and Billing;
- Radio Spectrum Management Processes; and
- Monitoring and Enforcement.

RA plans to develop an effective implementation mechanism of the Radio Spectrum Policy, to assist users to develop their communications strategies with awareness of the prospective direction of spectrum management.

RA also intends to issue a National Frequency Plan (NFP). This will ensure that comprehensive information of the current allocation of frequency bands in Qatar is available. It will also provide specific assignment policies and information on the availability of spectrum for particular applications. It will also set out the future spectrum releases, introduce licence rules and regulations and ensure monitoring of compliance. RA aims to reduce regulatory barriers to encourage innovation and competition among service providers.

In addition, RA plans to reform spectrum fees to ensure that they reflect the scarceness of resources and the benefits resulting from their use. RA will also ensure that the basis upon which licence fees are set is transparent and visible in the market. The current licence fee arrangements are being reviewed and the fees schedule will be revised and published.

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[15] ictQATAR Radio Spectrum Policy, dated April 2011 (published in March 2012)
Available at: http://www.ictqatar.qa/en/documents/document/ictqatar-radio-spectrum-policy-radio-spectrum-policy

RA will also implement advanced spectrum monitoring systems to ensure compliance with the licenses' terms and conditions and the applicable rules and regulations.

The Qatar National Spectrum Coordination Committee (QNSCC) will also be established as a strategic priority action. This committee, to be chaired by ictQATAR, will provide a forum for users of spectrum, both government users and the main commercial users, to share their perspectives, research and analysis and to discuss the strategic issues around allocation policy. It will provide an open forum for discussion on issues such as international and domestic radio-communication issues and allocation issues relating to the National Frequency Plan.

Question 23	Are there any other actions that RA should undertake to furtther improve the management of the spectrum resources? Please specify and provide rationale.
Question 24	What are the key factors that stakeholders consider the RA should take into account in developing the National Frequency Plan (NFP) and fees policy? Please provide a justification for your answer.
Question 25	Do stakeholders foresee/identify other issues in spectrum allocation and pricing that the RA should address as a strategic priority? What are those issues?

3.4.2 Revised numbering plan and associated numbering fees regime

RA sees benefits in making strategic decisions about the management of numbers through the development of a revised numbering plan. Numbers are an important national resource, for consumers, businesses and are used in the delivery of key public services. Their efficient management is important to ensure that numbers are available when needed and do not have to be changed. Having a clear numbering plan also promotes an efficient and transparent number allocation process that supports competition and innovation. This is particularly important as demand increases and new service providers enter the market.

RA already has a relatively advanced numbering allocation process which is fully automated using the Number Management System. Service providers have access to the system to request numbers and notifications are sent to them about their request status. RA plans to review the numbering plan and will make strategic decisions over number allocations including considering, as part of its policy, how short-codes, value-added services such as payment services through mobiles, for example, will be dealt with.

RA proposes that numbering allocation can be improved through the publication of allocation and usage policies. This will ensure that a clear and predictable policy is in place, which may have the potential to promote service innovation.

RA also proposes to introduce numbering fees in order to reflect number scarcity and promote efficiency through the use of the market-based incentive of charging service providers for the numbers that they receive.

Question 26	What factors do stakeholders consider important for the RA to take into account when reviewing the National numbering plan?
Question 27	Do stakeholders agree that additionnal allocation and usage of numbers are important strategic priorities for the RA?

3.5 Safeguarding the interests of consumers

RA considers that safeguarding the interests of consumers is a key strategic priority. A summary of the proposed actions under this strategic priority is shown in the figure below.

RA will safeguard consumer interests by improving the quality of information available to enable consumers to make informed choices while requiring operators to provide comprehensive and transparent information on their offers, high levels of customer service and required levels of service quality.

RA will address this by:

- Revamping of the Quality of Service (QoS) regulatory framework;

- Providing consumers with transparent and comprehensive information to make informed choices; and

- Development of a consumer protection policy and associated guidelines.

Figure 13 Safeguarding the interests of consumers

3.5.1   Revamping the QoS regulatory framework

Licensed service providers in Qatar have a number of QoS Key Performance Indicators ("KPIs") and targets in their respective licences.[16] Service Providers submit every six months to RA the results of their QoS measurements. It is apparent from the latest QoS results that the fixed and mobile operators are still not fully compliant with their QoS licence obligations. RA considers that significant work is still needed, focused on improving QoS outcomes in Qatar for both fixed and mobile services.

RA plans to take a series of actions to significantly improve the quality of all fixed and mobile services in Qatar over the next years. Stakeholders have indicated that quality of service is a particular problem in Qatar and while improvements have been made recently by the service providers, more needs to be done. Current outcomes need to be compared to outcomes in other comparable markets. In addition, more effective QoS monitoring will allow RA to assess and improve compliance, raising service standards and benefiting end-users. RA needs a more pro-active approach to dealing with non-compliance and RA will assess the range of legal options available to strengthen its enforcement powers. RA will also continue to regularly publish QoS results from the service providers. RA shall review and update the existing QoS service provider obligations, as appropriate to reflect identified issues and new/emerging technologies and services. RA believes that QoS obligations should always be adjusting to the current needs of the customers.

RA also intends to carry out annual customer satisfaction surveys to understand the views and experience of consumers regarding quality of service. The results of the surveys shall be published.

The quality of telecommunications services in Qatar is a key focus for ictQATAR, service providers, consumers and other market stakeholders. For this reason, RA recently launched a comprehensive project on the revamp of the QoS aiming to improve the QoS of fixed and mobile services in Qatar. The project includes the actions mentioned above. The project also includes the development of a QoS policy document and a comprehensive QoS regulatory framework document which will include the QoS KPIs and their respective targets, measurement methods, reporting procedures and templates, compliance and enforcements, etc. RA will work closely with the service providers to achieve the goal of improved QoS for the benefit of all parties: ictQATAR, service providers, consumers, and the telecom market in general. Effective collaboration and cooperation of the service providers is essential for the success of this project. The first step will be to identify and understand the real problems and to work together to overcome them. RA plans to inform and consult the operators during several stages of this project.

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[16] There are 22 fixed QoS parameters with target obligations and 6 mobile QoS parameters with target obligations.

In summary, RA plans to undertake the following actions in relation to improving the QoS of telecommunications services in Qatar:

1. Continue the publication of the QoS results of service providers on a regular basis;
2. Conduct and publish a customer satisfaction survey annually;
3. Increase nation-wide monitoring on whether service providers are meeting their licence obligations regarding mobile and fixed QoS Key Performance Indicators ("KPIs");
4. Adopt a predictable and transparent approach to deal with non-compliance of licence obligations regarding QoS KPIs;
5. Assess whether a revised set of fixed and mobile QoS KPIs is warranted; and
6. Development of a QoS policy and a comprehensive QoS regulatory framework document.

Question 28	Do stakeholders consider that the actions listed above will improve the quality of service? Are there any other actions the RA should consider taking?

3.5.2   Providing customers with sufficient information to make informed choices

RA will safeguard the interests of customers by improving the quality of information available. This will enable customers to make informed choices. This priority fits within the 2015 vision of the National ICT plan relating to consumer and digital rights and protecting end users.

RA will continue to ensure that customers benefit from competition in Qatar's telecommunications market, and aim to assist customers by providing them with valuable and timely resources to make informed decisions.

RA plans to take specific actions to safeguard customer interests through the provision of information to enable informed customer choices. Having clear and practical information will assist customers in choosing products and services that are right for them. It will also give greater transparency in the market which could help drive competition. Benefits could also be derived as a result of the reduced potential for mis-selling to consumers.

Over 2013/14, RA plans to publish information both on customer rights and on service provider tariffs and related information.

Question 29	What additional types of information does the RA needs to publish to allow consumers to make better informed choices?

3.5.3   Consumer protection policy

Under the Telecommunications Law, RA is required to develop a consumer protection policy. RA plans to develop this during 2013-14 and release it in 2014-15.

RA places importance on consumer protection and ensuring that the policies in place support this. The consumer protection policy will help to ensure that consumers are protected and that service providers act in the consumers' interests. It will also ensure that consumers know their rights in the telecoms area and that service providers in the market know their obligations with respect to consumers.

Question 30	What do stakeholders consider to be the key elements of a consumer protection policy? Please provide a justification for your response.

3.6 Supporting Qatar in the transition to a connected digital economy

It is essential for the development of the ICT industry in Qatar that the related and required regulatory framework and technical standards are 'fit for purpose' and comply with leading global practice.

As technologies change, this creates new challenges for the design and implementation of appropriate regulatory framework and standards. In many countries, new services and modes of delivery have been developed that are often unforeseen by existing regulation and also can change the market structure and level and type of competition. Regulators, therefore, need to consider the impact of this on the regulatory regime and whether revisions and update to the framework are required.

Globally, as technology has impacted the telecoms market there has been a shift from a regulatory focus on network regulation, dealing with interconnection and access to networks, to an end to end approach. For example, Voice over IP (VoIP) players such as Skype[17] have become increasingly successful in the market in delivering voice and data services. In addition, the advent of smart phones and 'mobile apps' such as Blackberry Messenger, WhatsApp[18] and Viber[19] are having a major impact on the way people communicate with each other. In this new world, usage is the driver, therefore the key regulatory concerns will relate to issues such as quality of service, interconnectivity and end user experience.

RA recognises that regulation must reflect changing technology and market developments. RA intends to adapt to these in terms of the scope of regulatory practices within the jurisdiction of RA, while maintaining a technology neutral approach and ensuring that the framework is 'future-proof'.

One of RA's proposed strategic priorities for 2013-2015 is to support Qatar in the transition to a connected digital economy. This will be done through the development of standards within RA's jurisdiction and policies/regulations that prepare the industry for the future. A summary of the proposed actions under this strategic theme is shown in the exhibit below.

Supporting Qatar in the transition to a connected digital economy

RA will assist industry in the development of standards and policies that will support Qatar in the transition to a connected digital economy.
RA will address this by:

- Ensuring that technical standards are fit for purpose and ready for new IP technologies, for example, by issuing an IPv6 implementation plan;

- Developing the required policies and regulatory frameworks; and

- Ensuring that cyber security and safety issues are appropriately addressed in the collaboration with Qatar Computer Emergency Response Team (QCERT) of ictQATAR.

Figure 14 Supporting Qatar in the transition to a connected digital economy

Whilst network regulation is vital to today's needs in the telecommunications market, tomorrow's communication will be focussed on end-to-end interactions and the regulatory regime will need to respond to changing market dynamics. It will be important for RA to consider regulation from a technology neutral perspective with a framework compatible with international regulation and consistent with internationally accepted technologies and standards.

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[17] www.skype.com
[18] www.whatsapp.com
[19] www.viber.com

For example, RA considers that the current technology for connection to the internet is IPv4, which has been in use since the 1980s, needs to be updated to IPv6. This is due to capacity constraints on the number of IP addresses that can exist using IPv4. IPv4 was also designed without taking security issues into consideration. RA will facilitate the transition to IPv6, which will allow for almost unlimited capacity on IP addresses, allow users to create their own networks to be directly connected to the internet and be more secure. IPv6 will also enable certain applications to be more effective[20] (such as those using Voice over IP) and allow for the further development of mobile and wireless applications. In this regard, RA will develop a national IPv6 migration plan and a strategy in collaboration with the different stakeholders inside and outside ictQATAR.

Also, RA considers that it is time to revisit and update ictQATAR's VoIP policy/position on the use of VoIP in Qatar that was issued in July 2008. Since the policy was developed there has been huge growth in VoIP traffic globally compared to circuit switched voice traffic. Given the changes in the market, RA considers that it is appropriate to review RA current policy position and issue a new and more comprehensive VoIP Policy that reflects current market conditions. It may also be necessary to development a legal framework for handling VoIP traffic (including, for example, access to emergency services and amendments that may be needed to the national numbering plan). RA plans to consult with stakeholders in 2013 on the proposed new VoIP policy.

RA will also assess whether additional regulatory measures are required to support Qatar in the transition to a connected digital economy. For example, it is considering future needs in Qatar in relation to international connectivity and the regulatory approach that should be adopted. It will be important for Qatar to improve international connectivity both to enhance the QoS and to support the entry of new service providers. At present each of the service providers has its own cable landing stations but it will be essential to improve significantly the access and availability of international connectivity for new entrants when they are introduced to the market. With key international events, such as the hosting of the 2022 World Cup, RA recognises the strategic importance of addressing these issues.

Similarly, RA plans to take the necessary steps to introduce new Internet exchange points at either the regional or national level to meet the industry requirements, to manage traffic more effectively within Qatar, and to support locally produced content.

RA will also ensure that cyber security and safety issues are appropriately addressed in collaboration with Qatar Computer Emergency Response Team (QCERT) of ictQATAR in order to meet the challenging security requirements of a connected digital economy.

Question 31	Do stakeholders consider that the RA needs to prioritise additional actions to help support Qatar's transition to a connected digital economy? Please provide a justification for your answer.
Question 32	What are the key barriers stakeholders face in that transition and to what extent do the proposed actions address them? What other actions may be needed?
Question 33	What does RA need to do to improve international data capacity in order to fulfill the Qatar's national vision for 2030 and Qatar's National ICT Plan and to prepare for major international events such as the World Cup 2022?
Question 34	Do stakeholders consider that new Internet exchange points are required at either the national or regional level? Please provide a justification for your answer.

3.7 Additional regulatory issues

RA would benefit from receiving the views of stakeholders on some additional strategic matters. These issues are important for the future development of the industry – but RA is still developing its position and would welcome the views of stakeholders. It is likely that these issues will become more pressing as RA implements a number of the actions set out earlier in this consultation document.

Question 35	Are there any further emerging regulatory issues apart from thoses mentioned above that should be considered by RA?

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[20] http://europa.eu/rapid/press-release_MEMO-12-414_en.htm?locale=en

4 Indicative Timeline for the Strategic Priorities and Actions

RA has developed an indicative timeline for each of the proposed actions under the five strategic priorities. These sets out the high level plan over the next three years and show the relative prioritisation of actions and dependencies between the actions. RA aims to deliver the strategic priorities within these indicative timeframes; however this will depend on a range of factors, including sufficient resources in the RA to deliver on the actions, the capacity of industry to implement the reforms proposed within the timeline, the close and constructive collaboration of stakeholders and the support of other government entities to deliver the actions.

2013	2014	2015
Introduction of a robust wholesale interconnection & access framework		
	Introduction of new service providers	
Reducing the barriers that customers face in switching operators		
Reduce barriers to network build		
Develop and publish guidelines on retail & wholesale price regulation		
Publish enforcement policy and procedures		
Streamline dispute resolution procedures		
Review arbitration processes for stakeholders to appeal RA decisions		
	Review licenses & licensing frameworks	
	Develop and publish competition policy	
	Revise numbering plan and associated numbering fees regime	
Review spectrum allocation and assignment policies and spectrum Fees		
	Establishment of the Qatar National Spectrum Coordination Committee	
Revamp of the QoS framework		
Providing consumers with sufficient information to make informed choices		
Consumer protection policy		
Ensure that technical standards are fit for purpose and ready for new IP technologies		
Develop required policies and regulatory frameworks, including revised VoIP policy		

Figure 15 Indicative timeframes for strategic priority actions

5 Instructions for Responding to this Consultation

5.1 Consultation procedures

All interested parties are invited to submit responses to the questions specifically identified in this document and to provide their views on any other relevant aspects. Comments should reference the number of the question being addressed or the specific section of this document if not responding to a particular question.

ictQATAR asks that, to the extent possible, submissions be supported by examples or relevant evidence. Any submissions received in response to this consultation will be carefully considered by ictQATAR when progressing to revised RAS Instruction. Nothing included in this consultation document is final or binding. However, ictQATAR is under no obligation to adopt or implement any comments or proposals submitted.

Comments should be submitted by email to raconsultation@ict.gov.qa on **5 May 2013 at the latest**. The subject reference in the email should be stated as "Regulatory Strategy". It is not necessary to provide a hard copy in addition to the soft copy sent by email.

5.2 Publication of comments

In the interests of transparency and public accountability, ictQATAR intends to publish the submissions to this consultation on its website at www.ictqatar.qa. All submissions will be processed and treated as non-confidential unless confidential treatment of all or parts of a response has been requested.

In order to claim confidentiality for information in submissions that stakeholders regard as business secrets or otherwise confidential, stakeholders must provide a non-confidential version of such documents in which the information considered confidential is blacked out. This "blackened out" should be contained in square brackets. From the non-confidential version it has to be clear where information has been deleted. To understand where redactions have been made, stakeholders must add indications such as "business secret", "confidential" or "confidential information".

A comprehensive justification must be provided for each and every part of the submission required to be treated as confidential. Furthermore, confidentiality cannot be claimed for the entire or whole sections of the document as it is normally possible to protect confidential information with limited redactions.

While ictQATAR will endeavor to respect the wishes of respondents, in all instances the decision to publish responses in full, in part or not at all remains at the sole discretion of ictQATAR. By making submissions to ictQATAR in this consultation, respondents will be deemed to have waived all copyright that may apply to intellectual property contained therein.

For more clarification concerning the consultation process, please contact Mr. Ahmad Sultan, Regulatory Policy Section Manager, at asultan@ict.gov.qa or +97444995415.

Annex I   Definitions and Acronyms

Bitstream Access:

A form of network unbundling where the incumbent maintains management control over the physical line and access seekers can only supply the services that the incumbent designates.

Dominance Designation:

An analysis which defines the dominant service provider in each relevant market, where it is found to exercise significant market power.

Dominant Service Provider:

A service provider that has been found, through the Market Definition and Dominance Designation (MDDD) process, to have a dominant position in a relevant market where it individually or jointly with others, is found to exercise significant market power.

Gap Analysis:

A process where a company or an institution compares its actual performance with a benchmarked expected performance to identify areas where it is exceeding or meeting expectations and areas where it can improve to meet expectations.

Gross Domestic Product (GDP):

The market value of all final goods and services produced within the borders of a single country within a year.

ictQATAR:

The Supreme Council of Information and Communication Technology.

Local Loop Unbundling:

The process of requiring incumbent infrastructure service providers to allow competitors to access the last part of their network that is used to connect the subscriber to the nearest switch.

Market Definition:

The initial analysis of a competition analysis, which identifies the relevant market in terms of products and geography.

Mobile Number Portability (MNP):

The ability of a subscriber to transfer between service providers without the need to change number.

NRA:

National Regulatory Authority.

Qnbn

Qatar National Broadband Network; the high-speed national broadband network that the Government of Qatar is planning to build.

RA (or ictQATAR-RA):

ictQATAR's Regulatory Authority, which is the body responsible for regulating the telecommunications market in Qatar.

Regulatory Account System (RAS):

A set of systems, processes, policies and procedures that enable a dominant service provider to establish a record keeping regime necessary to meet its regulatory obligations, and which keeps track of revenues, costs, assets and capital employed.

Reference Offers (ROs):

A document approved by a regulatory authority, which sets out the terms and conditions for which a firm will provide certain services.

Voice over Internet Protocol (VoIP):

Any technique that carries voice traffic over Internet Protocol.

Annex II Summary of Questions

Views and comments, on the fullest extent possible, on this Regulatory Strategy are invited from industry participants, other stakeholders and interested parties. We would ask to provide views and comments on this Regulatory Strategy generally and on a number of specific questions in particular. Below is a list of all the questions inside this document:

Annex III   Strategic Priorities and Action Plan of a Selection of Leading Telecom NRAs

NRA	Regulatory principles and strategic priorities	Specific ICT regulatory actions
Ofcom - UK[21]	For the 2013/14 year the following **regulatory principles** will apply: • Ofcom will operate with a bias against intervention, but with a willingness to intervene firmly, promptly and effectively where required; • Ofcom will strive to ensure that its interventions will be evidence-based, proportionate, consistent, accountable and transparent in both deliberation and outcome; and • Ofcom will always seek the least intrusive regulatory mechanisms to achieve its policy objectives. The **6 strategic purposes** are: • *Promote effective competition and informed choice* • *Secure optimal use of spectrum* • *Prioritise opportunities to participate* • *Protect consumers from harm* • *Maintain audience confidence in broadcast content* • *Contribute to and implement public policy defined by parliament*	• Ensure effective competition and investment in both current and superfast broadband • Promote effective choice for consumers by ensuring that clear and relevant information is readily available • Develop and implement policies that will improve the ease of switching between communications providers • Timely spectrum clearance in 800 MHz and 2.6 GHz to enable new awards while mitigating co-existence issues • Implement the UHF strategy to enable a potential release of 700 MHz for harmonised mobile use • Support the release of 2.3 GHz and 3.4GHz bands to meet spectrum demand • Work in collaboration with Government and industry to promote the widespread availability of superfast broadband • Implement reform of non-geographic numbering to ensure price transparency • Protect consumers in a range of priority areas, including silent calls and mid-contract price increases
TRA – Bahrain[22] (The 3rd National Telecommunications Plan is currently being developed but has yet to be released)	The strategic priorities identified in the 2010-2012 Strategic Plan included: • *Sector Development* • *Institutional strengthening* • *Safeguard interests of consumers* • *ICT Transition*	• Introducing ENUM • Making available commercially valuable spectrum • Ensuring that retail charges more closely align with the underlying costs structures; • Increasing the awareness of end-users with respect to the quality of service and price thereby ensuring better informed choice of service providers • Spectrum management and control • Identification of critical national infrastructures and a coordinated disaster recovery plan pertinent to

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[21] Ofcom (2012) *Draft Annual Plan 2013/14,* 19 December.
(http://stakeholders.ofcom.org.uk/binaries/consultations/annuealplan1314/summary/condoc.pdf)
[22] TRA (2010) *TRA 3 year work plan 2010 – 2012,* (http://www.tra.org.bh/EN/consultations.aspx). Note that only the Draft Plan is available on the TRA website.

		communications infrastructures • Establish consumer protection guidelines • Identification of potential and real hazards associated with the use of the internet • Support the development of the appropriate legislative tools and enabling environment in which ICT convergence will occur
iDA – Singapore (Strategic principles for the equivalent of the RA within the iDA)[2324]	Intelligent Nation 2015 (iN2015) is Singapore's 10-year master plan which was developed in 2005. The iN2015 reports provide an overview of the iN2015 vision, what it means for Singapore and what is required to achieve the vision. iDA Policies and Regulations constitute a large part of iDA's efforts to create a market environment that is both pro-consumer and pro-business. To ensure sustainable growth and competition in a multi-operator, multi-network environment, iDA formulates and develops short- and medium-term infocomm-related policies, as well as standards, codes of practices and advisory guidelines - all of which are enforceable by iDA - pertaining to issues such as licensing, interconnection, resource and competition management. iDA also monitors local and global infocomm market trends, developments and regulatory measures, while remaining technology-neutral, to ensure that the current infocomm policies and regulatory frameworks are effective and relevant. Throughout its Policy and Regulations work, iDA is committed to the principles of: • *Promoting effective and sustainable competition* • *Promoting facilities-based competition to the greatest extent possible* • *Relying on market forces* • *Adopting proportionate regulation* • *Remaining technology-neutral* • *Providing a transparent and reasoned decision-making process.* These principles are aimed at creating a market environment that allows free and fair competition, so that consumers' interests are protected and they benefit from greater choices and the proliferation of innovative products and services.	• Development and implementation of a framework for the reallocation of 4G spectrum. iDA plays a key role in managing the allocation and use of spectrum to ensure it is harnessed efficiently to deliver services such as mobile, fixed, satellite, short-range devices and broadcasting • Reviewing and consulting on Interconnection and Access Offers to support effective competition between market participants • Ongoing development and issue of guidelines on acceptable practices (e.g. on Interconnection & Access, Spectrum & Numbering Management, Competition Management & Next Generation NBN) to ensure a level-playing field and to protect consumers. • Reducing annual licence fee for Facilities-Based Operators • Ongoing review & fine-tuning of policies and regulations to reflect the dynamic nature of the infocomm industry • Controlling the numbering resource and managing the National Numbering Plan to help to ensure the adequacy of telecommunication numbers for use in Singapore. • Setting and monitoring Quality of Service (QoS) standards to regulate the performance of key services offered by operators • Enforcing competition frameworks, ensuring that licensees comply with the established price control regulations and reviewing mergers and acquisitions to promote and preserve the competitiveness of

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[23] See http://www.ida.gov.sg/Policies-and-Regulations/Overview.aspx. Information on the specific actions were taken from the iDA website (www.ida.gov.sg)
[24] See also information on Intelligent Nation 2015 here: See http://www.ida.gov.sg/About%20us/20100612134640.aspx

		the telecoms sectors
ARCEP - France[25]	ARCEP discloses its action plan once a year when publishing its annual report. Despite the fact that the annual report is mainly retrospective, an important part deals with new issues for the future. The latest annual report (for 2011) identified following strategic focus areas: • *A more competitive mobile market* • *Achieving nationwide fixed and mobile broadband coverage* • *Making the transition to fixed and mobile ultra high-speed access* • *Actions on behalf of consumers* • *Net neutrality*	• Introduction of a fourth 3G mobile operator (already completed) • Working to sustain the ongoing decrease in mobile termination rates • Introducing a mobile price index to provide greater transparency in changes in prices over time • Programmes to expand 2G and 3G coverage, including publication of operators' coverage information and verifying compliance with obligations • Improving access to existing fibre optic backhaul networks and taking targeted action in those areas not presently covered • Implementing schemes and taking actions to increase bandwidth on fixed networks • Supporting FTTH public-initiative network programmes to support the transition to ultra high-speed access • Introduction of new engineering rules to support network rollout and access • Implementing FTTH network sharing • Spectrum management and allocation • Ensuring a high level of consumer protection, e.g. through transparency in pricing and terms and conditions of use in the communications sector • Publishing survey results relating to mobile network quality of service, indicators for the fixed network and setting and monitoring minimum quality of universal service standards • Ongoing actions to develop and implement proposals relating to net neutrality based on: improving transparency and quality of service; IP interconnection; and addressing the use of traffic management practices

[25] ARCEP 2011 Annual Report (www.arcep.fr/uploads/tx_gspublication/rapport-2011-anglais.pdf)

| TRA - UAE[26] | The draft National ICT Policy 2013-2016 sets out seven strategic priorities for the TRA to facilitate the evolution of the ICT sector from the current state to a digital society enabler. These include
• *To facilitate ubiquitous high speed broadband access;*
• *To promote effective and sustainable competition;*
• *To facilitate access to converged services, applications and content;*
• *To enhance widespread ICT literacy;*
• *To drive ICT research and development;*
• *To encourage environmental sustainability through ICT; and*
• *To ensure continuous effectiveness* | • Facilitating sustainable and efficient investment on networks and infrastructure which allow broadband access nationwide ("NBA")
• Ensuring the ubiquity, availability, accessibility and affordability of NBA.
• Gradually introducing new competition in the market
• Ensuring fair and equitable access to scarce resources and facilities
• Encouraging introduction of new technologies which enable the convergence of the information, communications, and media sectors;
• Facilitating accessibility and affordability of services, applications and content;
• Encouraging the development of locally relevant, innovative and diverse Arabic content;
• Facilitating a secure environment in ICT applications and usage, including information and network security, and consumer privacy
• Facilitating a converged regulatory environment and ensuring transparency and efficiency of roles in the sector |

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[26] TRA (2012) *Building the Digital Society – National ICT plan 2013-2016.* Note that only specific ICT Regulatory actions have been included. There are a range of additional actions that cover broader policy objectives.

Annex IV Applicable Regulatory Framework (ARF)

Title	Content/Explanation	Reference Number / Issue Date	Web Link
Laws			
Decree Law No 36 for 2004	Establishes the Supreme Council for Information and Communications Technology (ictQATAR). The Decree Law outlines ictQATAR's objectives, functions, management, structure, resources, and general provisions that will apply to ictQATAR.	2 Aug 2004	http://www.ictqatar.qa/en/documents/document/decree-law-no-36-2004
Telecommunications Law - Decree Law No. (34) of 2006 on the Promulgation of the Telecom Law	Lays out policies on telecommunications licenses, radio spectrum management, interconnection and access, dominant service providers, service tariffs, numbering, market competition and consumer protection, as well as the objectives, powers and authority of the Supreme Council of Information and Communication Technology.	2006	http://www.ictqatar.qa/en/documents/document/decree-law-no-34-2006-promulgation-telecommunications-law
Telecommunication By-Law - Decision of the Board of the ictQATAR No. (1) of 2009 on the Promulgation of the Executive By-Law for the Telecom Law	Outlines definitions and general provisions for regulating telecommunications in Qatar including licensing, radio spectrum management, interconnection and access arrangements, tariff regulation, numbers and numbering, universal service, competition policy, consumer protection provisions, access to property, telecommunications equipment standards and approval, dispute resolution, and the provision of information.	25 Jun 2009	http://www.ictqatar.qa/en/documents/document/telecommunications-law-1
E-commerce Law - Decree Law No. (16) of 2010 on the Promulgation of the Electronic Commerce and Transactions Law	Qatar's first comprehensive e-Transactions and e-Commerce Law. The e-Commerce Law includes provisions on areas such as e-signatures, e-documents and authentication. It covers e-Commerce transactions in Qatar, including e-Government services. The law does not apply to documents relating to family and personal status.	19 Aug 2010	http://www.ictqatar.qa/en/documents/document/qatars-e-commerce-law
Individual Licenses			
Qatar Telecom (QTel) Q.S.C. Public Fixed License	License for the provision of public fixed telecommunications Networks and Services.	ICTRA 08/07B 7 Oct 2007	www.ictqatar.qa/sites/default/files/documents/QTel_FixedLicense.pdf
Qatar Telecom (QTel) Q.S.C. Public Mobile License	License for the provision of public mobile telecommunications Networks and Services. The license outlines the basic provisions of the license, annexures that provide details about the rights, obligations and authorized activities of QTel and a list of radio spectrum licenses that have been granted to QTel to provide services and activities.	ICTRA 08/07A 7 Oct 2007	http://www.ictqatar.qa/sites/default/files/documents/QTel_MobileLicense.pdf

Vodafone Qatar Q.S.C. Public Fixed License	Vodafone Qatar will be able to provide fixed telephony and data services to consumers, businesses and government in Qatar as well as other services such as leased lines, international connectivity and VSAT services.	ICTRA 04/10 29 Apr 2010	http://www.ictqatar.qa/sites/default/files/documents/Vodafone_FixedLicense_29April.pdf
Vodafone Qatar Q.S.C. Public Mobile License	The license outlines the basic provisions of the license, annexures that provide details about the rights, obligations and authorized activities of Vodafone Qatar and a list of radio spectrum licenses that have been granted to Vodafone Qatar to provide services and activities.	ICTRA 04/08 29 Jun 2008	http://www.ictqatar.qa/sites/default/files/documents/Vodafone_MobileLicense.pdf
Vodafone Qatar Q.S.C. Public Mobile License - Amendment	Amended license that outlines details like definitions, legal terms, obligations, activities/services and geographic coverage covered by the license, breach, penalties and amendment of license.	ICTRA 03/09 26 Feb 2009	http://www.ictqatar.qa/sites/default/files/documents/Vodafone_MobileLicense_Amended_26Feb.pdf
UDC Wholesale License	License granted to United Development Corporation PSC (UDC) to provide wholesale fixed telecommunications networks in Qatar	ICTRA 01/10 15 Mar 2010	http://www.ictqatar.qa/en/documents/document/united-development-corporation-psc-license-wholesale-fixed-telecommunications-net
GCCIA Authorization	Authorization to the Gulf Cooperative Council Interconnection Authority (GCCIA) pursuant to own and operate a telecommunications facility in Qatar that provides international dark fibre access to entities in Qatar that are licensed to provide telecommunications services and networks to the public. The authorization also allows the GCCIA pursuant to provide necessary services essential for the sale or provision of international dark fibre to the licensed entities.	25 May 2010	http://www.ictqatar.qa/en/documents/document/gccia-authorization
QSAT VSAT License	License granted by ictQATAR to QSAT Communications W.L.L to provide Authorized Very Small Aperture Terminal (VSAT) Networks and Services	ICTRA 12/10-2 22 Dec 2010	http://www.ictqatar.qa/en/documents/document/vsat-license-qsat-communications
RIGNET VSAT License	License granted by ictQATAR to RigNet Qatar W.L.L to provide Authorized Very Small Aperture Terminal (VSAT) Networks and Services	ICTRA 12/10-1 22 Dec 2010	http://www.ictqatar.qa/en/documents/document/vsat-license-rignet-qatar-0
Harris Salam VSAT License	License granted by ictQATAR to Harris Salam W.L.L to provide Authorized Very Small Aperture Terminal (VSAT) Networks and Services	ICTRA 03/12 22 Mar 2012	http://www.ictqatar.qa/en/documents/document/vsat-license-harris-salam

Qnbn License	Individual license for "Passive Fixed Telecommunications Networks and Services" to the state owned Qatar National Broadband Network Company (Qnbn) in the State of Qatar. The License is valid for 25 years beginning the Effective Date i.e. the date of grant of the License. Prior to this License, ictQATAR issued an Authorization to Qnbn on 14 July 2011 which has been revoked and stands void with the issuance of this License.	ICTRA 2012/07/22 22 July 2012	http://www.ictqatar.qa/en/documents/document/passive-fixed-telecommunications-networks-and-services-license-qnbn
Class Licenses			
Class License for Short Range Devices	Authorizes Short Range Devices (SRDs), which utilize radio transmitters to provide communications capabilities at a low radio frequency power (e.g. baby monitors, hearing aids, home alarms systems, garage door openers). The SRD Class License enables anyone in Qatar to possess, install and operate the approved class of devices at prescribed frequencies stated in the license without having to apply for a separate license. Under this Class License, there are no license or spectrum fees.	30 May 2010	http://www.ictqatar.qa/sites/default/files/documents/Class_License_SRDs_EN.pdf
Class License for Camel Racing Equipment	Class License for Type Approved Camel Racing Equipment, which streamlines the approval process for use, operation and installation of the equipment. Similar to the SRD license, this license allows any person to own and use Camel Racing Equipment without having to apply for a separate Class License.	23 Aug 2010	http://www.ictqatar.qa/sites/default/files/documents/Class_License_Camel_Racing_Equipment_EN.pdf
Class License for Retail Resale of Telecommunications Services	The class license for resale of telecommunications services enables hotels, public call offices, Internet cafes and wireless Internet zones, to resell telecommunications services on a non-exclusive basis. The parties can resell all types of telecommunications services from any Individual Public Telecommunications Operator licensed in Qatar; however they must notify ictQATAR prior to offering such services.	10 Jul 2011	http://www.ictqatar.qa/en/documents/document/class-license-resale-telecommunications-services
Class License for Owning and Operating a Private Telecommunications Network	The class license for owning and operating a private telecommunications network allows corporations to operate a private, closed user group network for internal, non-commercial purposes. Utilization of this class license does not require advance notice to ictQATAR.	ICTRA 20110710b 7 Sep 2011	http://www.ictqatar.qa/en/documents/document/class-license-owning-and-operating-private-telecommunications-network
General Instruments and Policies			

Policy on VoIP	A clarification of the legal position of VoIP technology in Qatar.	20 Jul 2008	http://www.ictqatar.qa/en/news-events/news/qatar-voice-over-internet-protocal-voip-policy
Type Approval Policy	Type Approval is the procedure by which Radio Equipment and Telecommunications Terminal Equipment (RTTE) is authorized by ictQATAR to be imported into or to be used in Qatar and involves verification of the equipment's compliance with the applicable standards and requirements.	30 Aug 2009	http://www.ictqatar.qa/sites/default/files/documents/TypeApprovalPolicy_0809.pdf
Type Approval Guidelines	Type Approval Guidelines for Radio Equipment and Telecommunications Terminal Equipment (RTTE) is issued by ictQATAR following the publication of the Type Approval Policy.	9 Jan 2011	http://www.ictqatar.qa/sites/default/files/documents/Type_Approval_Guidelines.pdf
Regulatory Accounting System – Instruction	Instructions for the implementation of the Regulatory Accounting System.	ICTRA 20100801 8 Aug 2010	http://www.ictqatar.qa/sites/default/files/documents/RAS_Instructions_QTel.pdf
Instruction on the calculation and payment of the License Fee and Industry Fee	This is a formal determination of ictQATAR directing QTel and Vodafone Qatar to comply with the requirements outlined in this instruction regarding the calculation and payment of the License Fee and Industry Fee.	ICTRA 2012/02/22 22 Feb 2012	http://www.ictqatar.qa/en/documents/document/instructions-methodology-and-timelines-annual-license-and-industry-fees-payments
Advertising Guidelines	Guidelines on Advertising, Marketing and Branding of Telecommunications Products. This is part of the QTel Virgin Mobile Decision and Orders, but applies to all offerings of Service Providers.	4 Apr 2011	http://www.ictqatar.qa/sites/default/files/documents/Decision%20&%20Orders%20Regarding%20QTel%20Virgin%20Mobile-Branded%20Services%20in%20Qatar.pdf
Order Setting Forth Rules for On-Net/Off-Net Price Differentiation	This order sets forth the rules of On-Network/Off-Network (on-net/off-net) Price Differentiation for Dominant Service Providers (DSP) in Qatar. The order states that no on-net/off-net price differentiation can be applied by a DSP in Qatar.	ICTRA 2011/05/15 15 May 2011	http://www.ictqatar.qa/sites/default/files/documents/2011%2005%2015%20Order%20On-net_Off-net%20FINAL.pdf
Intra-GCC Roaming rates	ictQATAR Instruction and Rules - Intra-GCC Roaming rates (Voice only)	5 Jul 2011	Issued to SPs
Radio Spectrum Policy	Issued to promote the economic and societal benefits from use of all spectrum, to provide a transparent, non-discriminatory and predictable approach to spectrum management and to take the least intrusive interventions consistent with achieving public policy objectives and efficient spectrum use.	14 Mar 2012	http://www.ictqatar.qa/sites/default/files/documents/ictQATAR%20-%20Radio%20Spectrum%20Policy%20-%20English.pdf
Guidelines for Communications Towers and Mast Radio Antenna Emissions		6 Oct 2010 ictQATAR/ RA/2010-10	

Economic Regulation			
Market Definition and Dominance Designation 2010 –Notice and Orders	The Supreme Council of Information and Communications Technology, ictQATAR, has designated QTel as a Dominant Service Provider (DSP) in all 14 relevant retail and wholesale markets in Qatar, following the Regulatory Authority's 2010 Market Definition and Dominance Designation (MDDD) Review. 31b contains the Notice of the Standards, Methodology and Analysis to be applied in the Review of Market Definition and Dominance Designation in the Telecommunication Sector in Qatar. 31a contains the Response Document of the MDDD 2010 and a Review of Definition of Relevant Markets and Designation of Dominant Service Provider in Qatar.	ICTRA 2011/10/31 31 Oct 2011 ICTRA 2011/10/31 b 31 Oct 2011 ICTRA 2011/10/31 a 31 Oct 2011	http://www.ictqatar .qa/sites/default/fil es/documents/MD D_Notice_English. pdf
Instruments Issued in Dispute Resolutions			
Dispute Resolution Rules	Dispute Resolution Rules outline the procedures for lodging and resolving a dispute according to ictQATAR's powers to receive and settle disputes between telecommunications service providers under the Telecommunications Law 34 of 2006 and Executive By-Law 1 of 2009.	19 Aug 2010	http://www.ictqatar .qa/sites/default/fil es/documents/Dis pute_Resolution_ Rules.pdf
Decision on Complaint by Vodafone	ictQATAR Resolves Complaint From Vodafone Qatar Complaint over QTel International Direct Dialing	30 May 2011	http://www.ictqatar .qa/en/documents/ document/ictqatar- resolves- complaint- vodafone-qatar
QTel Ramadan Promotion	ictQATAR issued a decision on a complaint filed by Vodafone Qatar against Qatar Telecom (QTEL) filed on August 1, 2011 concerning a promotional telecommunications service offering throughout the month of August 2011 (QTel Ramadan Promotion). This document contains the findings of ictQATAR's review and final decision.	27 Sep 11	http://www.ictqatar .qa/en/documents/ document/decision -QTel-ramadan- promotion-issued- vodafone

	After QTel's introduction of "Virgin Mobile" branded services in Qatar on 13 May 2010, ictQATAR issued Orders and Instructions to QTel regarding compliance with the current ARF. The Orders and Instructions required changes to marketing conduct by QTel and advertising materials that appeared to represent Virgin Mobile as a separate and new service provider in Qatar. On November 11, 2010 QTel requested modification of the Decision and Underlying Instructions of July 22, 2010. After due consideration of QTel's request and further investigation by ictQATAR, the request was denied. This Decision cautions again that ictQATAR will treat further non-compliance very seriously.	13 Dec 2010	http://www.ictqatar.qa/sites/default/files/documents/Decision_QTelVirginMobile_13Dec2010_EN.pdf
Decision to QTel Virgin Mobile Branded Services			
Determination on Interconnection Charges between Vodafone Qatar and QTel	The Supreme Council for Information and Communication Technology (ictQATAR) issued its determination of interconnection service charges for Vodafone Qatar QSC to interconnect with Qatar Telecom (QTel) QSC, so that Vodafone customers can terminate calls on the QTel network. ictQATAR issued the determination in response to Vodafone's request. Vodafone Qatar made the request, pursuant to its license, after being unable to reach an agreement with QTel within 60 days.	10 Feb 2009	http://www.ictqatar.qa/sites/default/files/documents/InterconnectionCharges_QTel&Vodafone.pdf
Other Documents of General Importance			
Qatar's National ICT Plan 2015: Advancing the Digital Agenda	ictQATAR developed Qatar's National ICT Plan 2015: Advancing the Digital Agenda, which will guide their efforts through the end of 2015. The plan is aligned with the Qatar's National Vision 2030, and its specific programs are aligned with Qatar's National Development Strategy 2011-2016.	19 Jun 2011	http://www.ictqatar.qa/en/documents/document/qatar-s-national-ict-plan-2015-advancing-digital-agenda
Strategic Sector Review Report	Strategic sector review assesses the current state of competition in Qatar's telecommunications sector, and includes recommendations to promote sustainable future development in the sector. This is the first strategic sector review done by ictQATAR, and it covers the period from the start of the market liberalization process until the end of 2010.	ICTRA 07/07/2011 7 Jul 2011	http://www.ictqatar.qa/sites/default/files/documents/Strategic%20Sector_Review.pdf
Consumer Alerts	Keeping your Data Roaming Bills Down Mobile Premium Rate Services Phone bills, Contracts and Charges Online Shopping Mobile Phone Contracts Fixed Line Phone Services International Roaming Tips Protecting your mobile phone from Spam and Scam Bundling phones with Internet and other Services		http://www.ictqatar.qa/en/department/regulatory-authority/consumer-rights/consumer-tips

Telecoms Consumer Guide	As Qatar's independent telecommunications regulator, ictQATAR is committed to ensuring best practices from telecoms service providers whilst protecting consumer rights. This Consumer Guide sets out your rights, outlines the complaints procedure and provides contact details.	Dec 2011	http://www.ictqatar.qa/en/documents/document/telecoms-consumer-guide
Notice - Security Requirements for Public Internet Services through International Satellite Providers	This is a public notice, issued by ictQATAR the security requirements for public Internet services through International Satellite Providers. All publicly licensed telecommunications operators in Qatar are required under the Telecommunications Law 34 of 2006 to ensure customer communications are secure and protected, and service provision and business operations are in line with the requirements of security authorities in Qatar. If an organization or person is using Internet services provided by an international satellite provider, they should be aware that this is unlicensed and unauthorized telecommunications service provision in Qatar.	5 Oct 2011	http://www.ictqatar.qa/en/documents/document/notice-security-requirements-public-internet-services-through-international-satel
Telecommunications Market Overview	The purpose of this document is to provide a short overview of the Qatari economy and telecommunications market, which has been published in light of launch of the new telecommunications licenses for fixed and mobile services. The document gives an overview of the country's economy, its telecommunications sector and the telecommunications regulatory framework.	22 Apr 2008	http://www.ictqatar.qa/en/documents/document/telecommunications-market-overview
Consultation on the Liberalization of the Telecommunications Sector in the State of Qatar	This document outlines the general policy for liberalizing telecommunications in the State of Qatar and invites public comments on a variety of policy issues that are of central importance to the future development of the telecommunications sector.	23 Apr 2007	http://www.ictqatar.qa/en/documents/document/consultation-liberalization-telecommunications-sector-state-qatar
ictQATAR-Regulatory Authority 2011/12 Annual Report	This report showcases the measures the Authority has taken throughout the year to foster competitive markets in order to promote the efficient, fairly priced and high-quality supply of telecom services to end-users, and to promote public confidence in the telecom sector.	15 Nov 2012	http://www.ictqatar.qa/en/documents/document/regulatory-authority-annual-report-2011