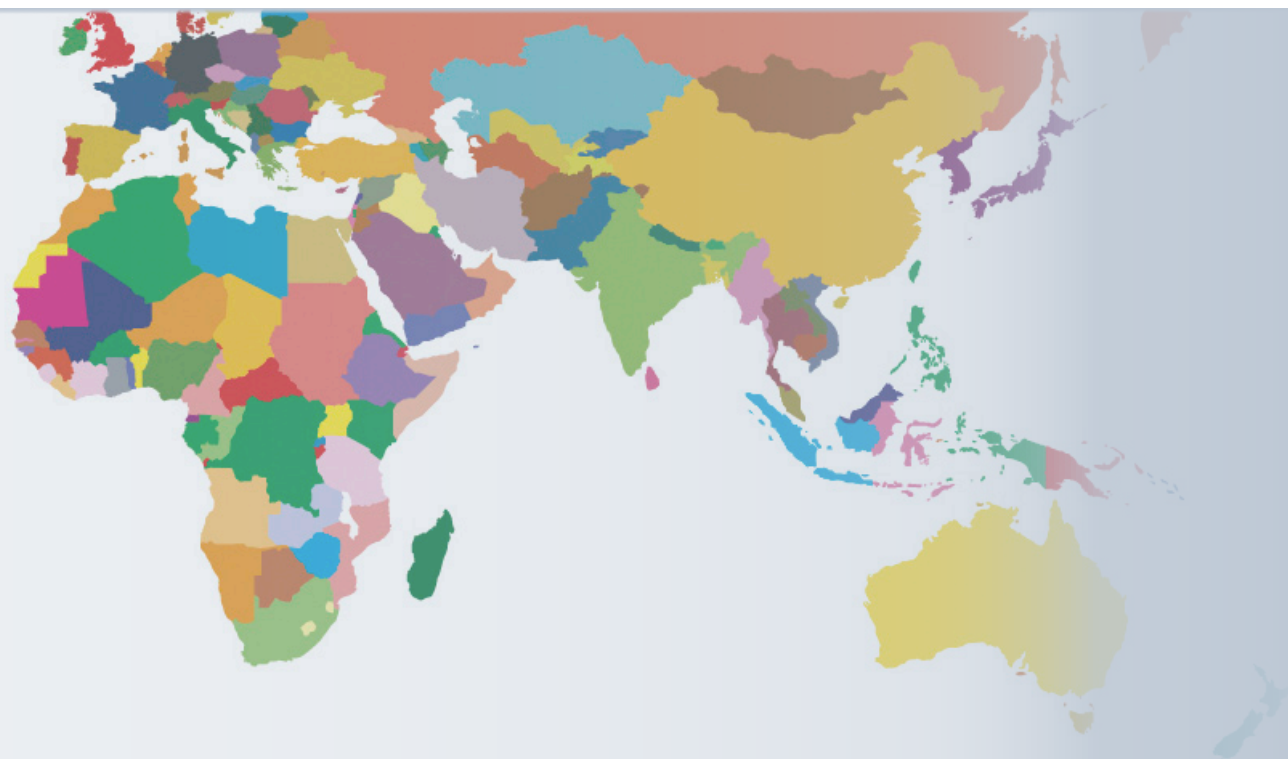

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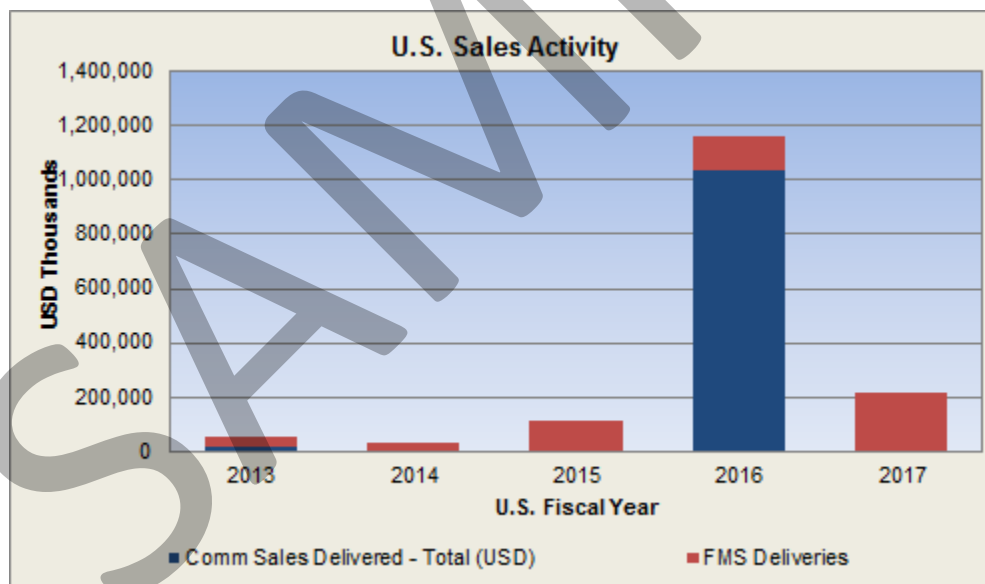
standing territorial dispute. Following the resolution of the dispute in 1990, the two countries renewed their military relationship.

Qatar has not been a beneficiary of either the U.S. Military Assistance Program (MAP) or Foreign Military Financing (FMF). In addition, the country does not participate in the International Military Education and Training (IMET) program. However, a new military relationship between the two countries has been growing over the last few years. The U.S. was instrumental in revamping the Al Udeid Air Base near the capital of Doha, which may eventually host a permanent U.S. military presence for use during emergencies in the Middle East. Qatar and the U.S. have jointly spent about \$1 billion equipping the air base with a 15,000-foot runway (now the longest in the Middle East) capable of handling some of the heaviest U.S. cargo carriers and fighter planes. The U.S. military's CENTCOM Forward Headquarters is based in Qatar, and played an important role in the U.S. invasion of Iraq in 2003. News came in late 2006 that the U.S. and Qatar would jointly operate the Al Udeid Air Base and that CENTCOM would build a permanent military headquarters in Qatar to replace the temporary base at Camp As-Sayliyah.

While the U.S. does not provide military assistance to Qatar, the U.S. has offered the country – along with other customers for American systems – waivers on some defense costs associated with arms sales in order to facilitate deals. Bloomberg News reported in June 2018 that, from 2012 to 2017, Qatar received up to \$2.6 billion in waivers. A further breakdown was not available.

Qatar has also made limited efforts at providing military assistance of its own. In January 2006, the Qatari government decided to donate 100 military vehicles to the Palestinian Authority. The vehicles were to be used to help alleviate severe transportation shortages for the PA's police and security forces in Gaza. However, there is no confirmation that the vehicles ever arrived, probably due to Hamas's takeover of Gaza from the PA.

Arms Trade



U.S. Arms Sales. From 1995 to 1999, Qatar imported about \$1.8 billion worth of arms. France and the U.K. were by far the leading suppliers, with the U.S. only a minor player. Since 2005-2006, however, the U.S. has made substantial inroads into the Qatari market, although from 2006-2009, the largest number of armaments agreements continued to flow from Western Europe (\$500 million).

A relatively minor arms buyer, Qatar has also become a minor seller. In 2006, it was Mexico's main source of weaponry, with more than 24,000 Thomson-Brandt 120mm mortar rounds and 559 Euromissile MILAN 1 anti-tank missiles sold from Qatari armed forces stocks. All of the equipment was of 1981-1983 vintage, according to reports.

Qatar: Section 1 - Data

Between FY50 and FY15, Qatar ordered about \$9.13 billion worth of U.S. military equipment through FMS agreements, with the majority coming in FY14. FMS deliveries totaled \$253.86 million. During the same period, the U.S. approved commercial export licenses worth \$1.51 billion for arms sales to Qatar.

U.S. Sales Activity - Qatar, 2013-2017					
	2013	2014	2015	2016	2017
FMS Agreements	\$0	\$8,766,962	\$16,761	\$77,681	\$14,300,380
Comm Sales Auth - Articles (USD)	\$61,697	\$112,092	\$52,031	\$1,132,678	\$9,873
Comm Sales Auth - Services (USD)	\$2,803	\$80,095	\$42,400	\$4,670	\$15,000
Total Commercial Sales Authorized	\$64,500	\$192,187	\$94,431	\$1,137,348	\$24,873
Comm Sales Delivered - Total (USD)	\$17,305	\$6,193	\$1,248	\$1,032,592	\$4,964
Comm Sales % of Total Deliveries	29.6%	19.1%	1.1%	89.0%	2.3%
FMS Deliveries	\$41,247	\$26,313	\$111,897	\$127,925	\$209,836
FMS Deliveries % of Total Deliveries	70.4%	80.9%	98.9%	11.0%	97.7%
Total Deliveries	\$58,552	\$32,506	\$113,145	\$1,160,517	\$214,800

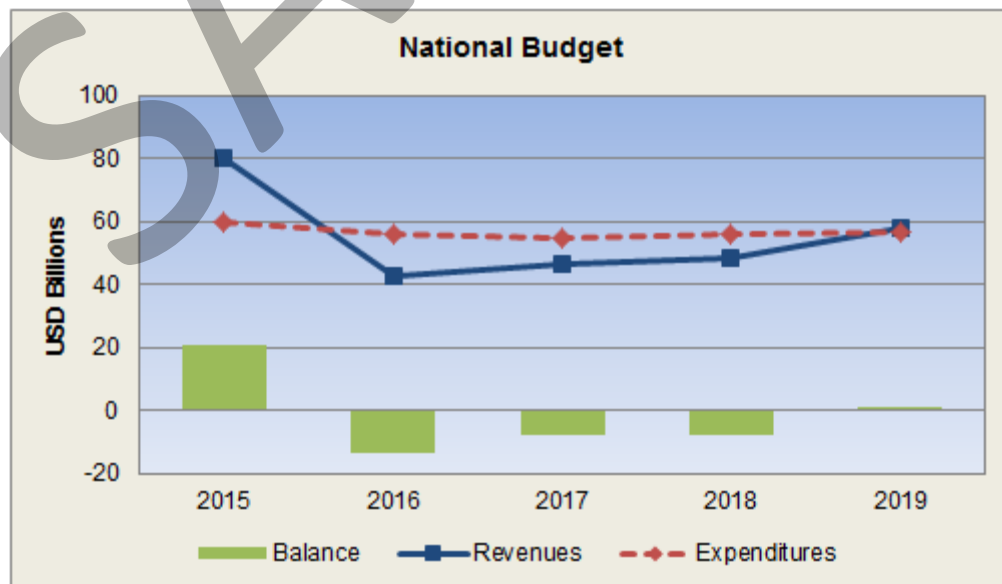
Currency scale: USD thousands

* All years are U.S. fiscal years.

International Arms Sales. Qatar has sought to diversify its supplier base so as to reduce dependency on any single exporter. While the country remains a large importer of American systems, Qatar has also moved forward with multibillion-dollar military aircraft purchases from France and the U.K. Qatar's two Rafale orders total over \$7 billion, while its Typhoon acquisition is expected to cost \$6.7 billion. From Italy, Qatar is procuring seven warships.

From Turkey, Qatar has purchased new armored vehicles, and the country has bought missile systems from China. The value of these contracts is unknown, but Qatar will likely seek further defense contracts with these suppliers in the future.

National Budget



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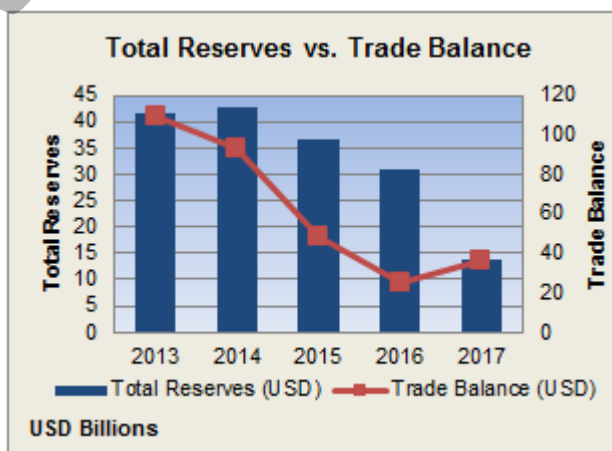
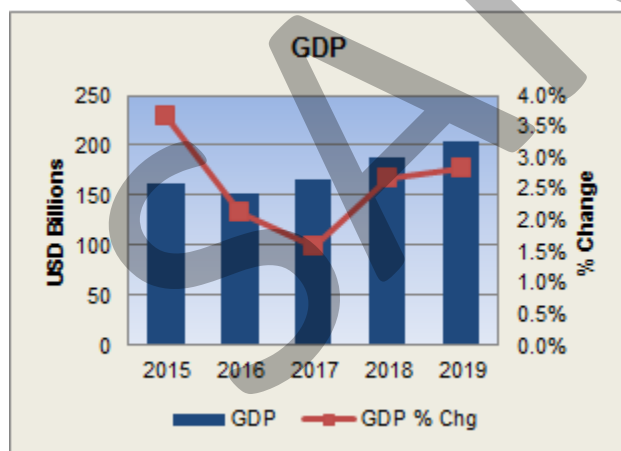
Budget. Qatar's fiscal year runs from April 1 to March 31. The country's Ministry of Finance releases some budget data.

National Budget and Public Debt, 2015-2019					
	2015	2016	2017	2018	2019
Gov't Revenues	292.8	156.0	170.1	175.1	211.0
Gov't Revenues (USD)	\$80.4	\$42.9	\$46.7	\$48.1	\$58.0
Gov't Expenditures	217.3	204.5	198.4	203.2	206.7
Gov't Expenditures (USD)	\$59.7	\$56.2	\$54.5	\$55.8	\$56.8
Budget Balance	75.5	-48.5	-28.3	-28.1	4.3
Budget Balance (USD)	\$20.7	-\$13.3	-\$7.8	-\$7.7	\$1.2
Gross Debt	209.3	258.0	326.7	366.0	362.4
Gross Debt (USD)	\$57.5	\$70.9	\$89.8	\$100.6	\$99.6
Gross Debt % of GDP	35.5%	46.7%	53.8%	53.4%	48.7%
Net Debt	N/A	N/A	N/A	N/A	N/A
Net Debt (USD)	N/A	N/A	N/A	N/A	N/A
Net Debt % of GDP	N/A	N/A	N/A	N/A	N/A

Local currency scale: billions; USD scale: billions

N/A = Not Available

Economic Synopsis



Economy Outlook. Qatar is one of the world's richest nations. Bolstered by oil demand, long-term liquefied natural gas (LNG) contracts, and massive gas reserves, Qatar has experienced rapid GDP growth since 2003. Despite the global economic and financial slowdown, Qatar – buttressed by increased LNG capacity – has one of the fastest-growing economies in the world. Qatar's riches are predicated on oil and gas. Qatar's gas reserves are among the largest in the world, with proven oil reserves of 25 billion barrels, enough to ensure output at present levels for two decades. But perhaps more important was the move in the late 1990s by the emir, Sheik Hamad bin Khalifa al-Thani, to concentrate on building LNG export facilities as a means of ensuring delivery to far-off markets

Qatar: Section 1 - Data

in Asia, Europe, and the United States. By doing so, Qatar has become the world's leading LNG exporter since 2003.

But while the country's energy resources have been a boon to Qatar, the government is intent on diversifying the economy – around 85 percent of exports are energy products – and has used budget surpluses to plow money back into public projects. Qatar's industrial base remains small in comparison to Saudi Arabia's, and economic policy has increasingly focused on expansion into areas such as small and medium-size industries, financial services, and the high-tech sector. The Qatar Financial Center was set up in March 2005 to attract international financial houses and multinational corporations.

The government has also channeled budgetary surpluses into sovereign wealth funds. The Qatar Investment Authority (QIA) sovereign wealth fund is tasked with heading the nation's foreign investment interests, and has made significant investments in high-profile brands in China, the U.K., the Middle East, and North Africa. The QIA was estimated to hold over \$320 billion in assets as of 2018, ranking it 11th in the world, according to estimates by the Sovereign Wealth Fund Institute. Qatar also holds other sovereign wealth funds in the areas of health care and education, and a stabilization fund that falls under the control of the Finance Ministry.

There is also the reality for Qatar that, at some point, its economic growth will level off with the conclusion of its energy projects. This is an uncomfortable prospect at a time when food and housing prices for the average Qatari have escalated at breakneck speed. A revamping of the economy and the educational system is needed to keep the country moving forward. Plans to transform the educational system to ensure enough homegrown talent emerges to fill employment slots among local and foreign firms should help ease the economic transformation currently underway. At present, the World Bank ranks the Qatari economy 83rd in the world in terms of ease of doing business. Whereas in the late 2000s annual FDI (foreign direct investment) inflows averaged around \$5 billion, FDI in recent years has slid, hovering around \$1 billion annually.

Despite efforts to diversify the economy, Qatar remains susceptible to fluctuations in the price of oil, as occurred in the second half of 2014. The country fell far short of its "break-even" oil price, meaning that Doha ran a significant deficit in its national budget over the last few years that is only now returning to a tentative surplus. The slump in oil prices has seen several organizations, such as the International Monetary Fund (IMF), decrease their expectations for economic growth in the country, from over 6 percent to under 3 percent annually. Through 2023, the economy is expected to grow by about 2.7 percent annually.

The dispute that erupted in mid-2017 with the "Anti-Terrorism Quartet" (ATQ) threatened to harm the Qatari economy, particularly given that a significant amount of Qatari gas exports go to the UAE, one of the countries cutting ties with Doha. Even so, the Qatari economy has remained resilient and is likely able to weather the crisis. The ATQ imposed a blockade on Qatar, but the measures had only a temporary effect on the Qatari economy, which was able to reorient the sources of imports. Furthermore, the export of gas to the UAE continues. The blockade did, however, force Qatar to utilize a significant portion of its reserves to stabilize the economy.

Qatar: Section 1 - Data

Economy, 2012-2019								
	2012	2013	2014	2015	2016	2017	2018	2019
GDP	680.1	723.4	750.7	588.7	552.3	607.6	685.4	743.7
GDP (USD)	\$186.8	\$198.7	\$206.2	\$161.7	\$151.7	\$166.9	\$188.3	\$204.3
GDP % Chg	4.7%	4.4%	4.0%	3.7%	2.1%	1.6%	2.7%	2.8%
Total Reserves	118.4	151.4	155.6	132.9	112.1	50.1	-	-
Total Reserves (USD)	\$32.5	\$41.6	\$42.7	\$36.5	\$30.8	\$13.8	-	-
Exports	484.1	498.2	479.0	281.3	208.4	245.7	-	-
Exports (USD)	\$133.0	\$136.9	\$131.6	\$77.3	\$57.3	\$67.5	-	-
Imports	91.8	98.4	139.2	103.7	116.2	112.0	-	-
Imports (USD)	\$25.2	\$27.0	\$38.2	\$28.5	\$31.9	\$30.8	-	-
Trade Balance	392.3	399.7	339.8	177.6	92.2	133.7	-	-
Trade Balance (USD)	\$107.8	\$109.8	\$93.4	\$48.8	\$25.3	\$36.7	-	-
Inflation	1.8%	3.2%	3.4%	1.8%	2.7%	0.4%	3.7%	3.5%
Unemployment Rate	-	-	-	-	-	-	-	-
FX Rate (Local to USD)	3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.6

Local currency scale: billions; USD scale: billions

Manufacturing Capability

Qatar has no significant domestic arms manufacturing capability, but has in recent years made efforts to develop its defense industry. In 2018, in particular, the Qatari government made clear its desire to establish a domestic arms industry with the announcement of Barzan Holdings at DIMDEX. Barzan Holdings will facilitate projects with foreign firms and invest in domestic defense capabilities.

Major Companies

Company	Primary Activity
Barzan Holdings	Part of MoD; partners with foreign firms to pursue joint ventures and technology transfer.
Stark Motors	Produces armored vehicles.

Qatar: Section 1 - Data

Political and Security Environment



Source: CIA World Factbook

Qatar: Section 1 - Data

Government Body. The State of Qatar is a tribal monarchy run by successive generations of the al-Thani family. The emir, who presides over the Gulf nation, is both head of state and commander in chief of the armed forces. Historically, the emir has wielded absolute personal, political, and military authority.

Executive: A Family Affair. The head of government is the prime minister, who is appointed by the monarch. The al-Thani family holds all key Cabinet posts in Qatar, including those of prime minister, minister of interior, and minister of foreign affairs.

The tradition of family rule dates back to 1971, when Qatar gained independence from Britain. The al-Thani family – like the al-Sabahs of Kuwait and the House of Saud in Saudi Arabia – has dominated virtually all important levels of government decision-making.

The elder al-Thani, the grandfather of the current monarch, became head of state in February 1972, and remained in power until he was ousted by his eldest son and crown prince. The grandfather had ousted his uncle from power in 1972. The June 1995 palace coup followed a pattern of similar family coups in the Middle East, with countries changing hands when fathers and sons or ruling families had a falling out. In 1964, the ruling family in Saudi Arabia eased out King Saud in favor of his son, Crown Prince Faisal, and in Oman, Sultan Qaboos ousted his father, Sultan Said, and sent him into exile in London in 1970.

On June 25, 2013, Sheik Hamad bin Khalifa al-Thani, who assumed power in 1995 after ousting his father, transferred power to his son, Crown Prince Sheik Tamim bin Hamad al-Thani. The transition of power broke the normal pattern of rulers remaining in charge until they die or are ousted. Particularly noteworthy is the new emir's age – he was 33 at the time he became emir.

Political Reform. Although it remains an authoritarian monarchy, Qatar is one of the few feudal hereditary monarchies that have introduced liberal political measures, including a relatively free press, municipal elections, and U.S.-style educational institutions. Qatar began moving toward participatory government under Sheik Hamad, as the emir consulted with his ministers and Advisory Council while simultaneously encouraging his people to participate in government.

A significant political reform program has been in the works since 1995; the first step toward achieving political reform was reached when the first open municipal elections were held in 1999. Political reform efforts reached a major milestone in 2005, when a permanent Constitution came into force. A referendum was held in 2003 to approve a draft of a permanent Constitution. The Constitution was finalized in 2004 and became effective in June 2005. The Constitution confers equal rights to all citizens, freedom of speech, a free press, and freedom of assembly, and does away with separate religious and civil courts.

Unlike most of the other Arab countries in the region, Qatar escaped the Arab Spring without any significant protests. Though some attempted to spark protests through social media, most Qataris decided against protesting – primarily because many felt there was nothing to protest. Even so, Sheik Hamad moved forward with introducing elections for the Advisory Council.

Legislative. Also of major importance, the Constitution provides for separation of powers between the executive, legislative, and judicial branches of government. The new legislative body is the 45-member Advisory Council, or Majlis al-Shura. This council is composed of 30 directly elected members and 15 members appointed by the emir. The council has legislative powers; the powers of the executive and judicial branches are still to be defined.

Council elections were expected to be held in 2005, 2007, and 2010, but have been delayed largely because of the need to finalize the election law and set constituency boundaries. Then-emir Sheik Hamad announced in October 2011 that elections for 30 popularly elected seats in the Advisory Council would be held in 2013. However, this scheduled election was indefinitely postponed after Sheik Hamad extended the Advisory Council's term prior to transferring power to Sheik Tamim.

Military Posture

The Qatari military posture traditionally has been oriented around the potential threat of Iran to Qatar and, more broadly, the Gulf Cooperation Council (GCC). Iran maintains some territorial claims that conflict with GCC states and has been accused of covertly aiding terror groups that operate in Bahrain, in particular. Iranian ballistic and cruise missiles remain a potential threat to the GCC countries, especially as Iran has improved the range and

Qatar: Section 1 - Data

accuracy of its weapons. Though some of the missiles are reported to have failed, Iran demonstrated its ability to conduct surface-to-surface strikes with a salvo of missiles launched in mid-2017 at militant positions in Deir ez-Zor, Syria. The strikes were retaliation for a pair of terror attacks carried out in Tehran by the Islamic State, but most certainly were read by the GCC in the context of Iran's capabilities against the alliance.

In June 2017, a brewing feud between Qatar and several of its neighbors erupted when Bahrain, Egypt, Saudi Arabia, and the United Arab Emirates announced that they were severing ties with Doha. The four countries, collectively referred to as the Anti-Terrorism Quartet, accused Qatar of a litany of transgressions – primarily, meddling in each country's affairs and destabilizing the region through the support of terror groups. The ATQ complained that Qatar has not lived up to its end of an agreement reached in 2014, when, following a similar round of brinksmanship, Doha promised to tone down its support for regional Islamist movements. Qatar denies the ATQ's charges of supporting terrorism, and thus far the sides have been unable to reach a compromise over the dispute.

The dispute with the ATQ has not resulted in a direct military confrontation. Nevertheless, as relations with the ATQ countries have soured, Qatar has deepened its defense cooperation with Turkey – particularly by allowing the Turkish military to establish a base on Qatari soil – and even signaled some interest in strengthening ties with Iran. These developments are indicators of Qatari unease over the dispute, particularly given the significant power disparity between its military and the collective militaries of the ATQ countries. Reports in American media that the ATQ countries, spearheaded by Saudi Arabia, toyed with (but ultimately did not carry out) an invasion of Qatar in 2017 underscore to the Qatari military the need to ensure strong partnerships with friendly countries.

The feud with the ATQ has seemingly had an impact on Qatari arms procurement. Since 2014, Qatar has embarked on a number of arms purchases and many of those that were pending at the time of the June 2017 collapse in ties were subsequently completed. Qatar's procurement of Chinese short-range ballistic missiles has largely been seen in the context of its posturing against the ATQ countries, rather than as a way to bolster its defenses against Iran. Qatar is expected to remain a strong military market for the next few years, with an interest in modernizing the various branches of its military. Even should the dispute with the ATQ be resolved, the feud has likely left a significant impression on Qatar, which may for the time being seek to ensure that its military has the ability to counter systems entering service in the UAE and Saudi Arabia.

Infrastructure

Description. Qatar is located on the southern shore of the Persian Gulf, and borders the United Arab Emirates to the southeast and Saudi Arabia to the south. The main peninsula extends northward into the Persian Gulf from the Saudi Arabian mainland. Qatar's geographical area covers about 11,437 square kilometers, with a coastline of about 563 kilometers. It has a population of approximately 2.4 million, primarily non-nationals, with an annual growth rate of 1.95 percent.

Roads. 9,830 kilometers

Airfields. Six, four with paved runways; one heliport

Ports. Doha, Ras Laffan, Mesaieed

Pipelines. Condensate, 288 kilometers; condensate/gas, 221 kilometers; gas, 2,383 kilometers; liquid petroleum gas, 90 kilometers; oil, 745 kilometers; refined products, 103 kilometers

Major Exports. Petroleum products, liquefied natural gas, fertilizers, steel

Major Imports. Machinery and transport equipment, food, chemicals

Directory

Defense

The branches of the Qatari military can be contacted via the Ministry of Defense's general address. Qatar's defense purchases are handled by the Ministry of Defense and its Department of Purchasing, whose general mailing addresses are as follows:

Ministry of Defense

PO Box 37
Ad Dawhah
Doha, Qatar
Tel: + 974 4461 4111

Department of Purchasing

PO Box 1908
Ad Dawhah
Doha, Qatar

Embassies

Embassy of the United States

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Washington, DC 20037-1305
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Fax: + 1 (202) 237-0061
E-mail: info@qatarembassy.org

Military Attaché

Tel: + 1 (202) 274-3131
Fax: + 1 (202) 237-0753

* * *

Analysis 1

The Military Market for the Middle East

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