

Deloitte.



Qatar's Third National
Development Strategy
Turning ambitions into a reality

**MAKING AN
IMPACT THAT
MATTERS**
since 1845

Introduction

Qatar's Third National Development Strategy (NDS3) marks the final phase of a national journey steeped in ambition and foresight. With its recent announcement, the focus now shifts on the **key factors that are essential for turning strategy into successful outcomes.**

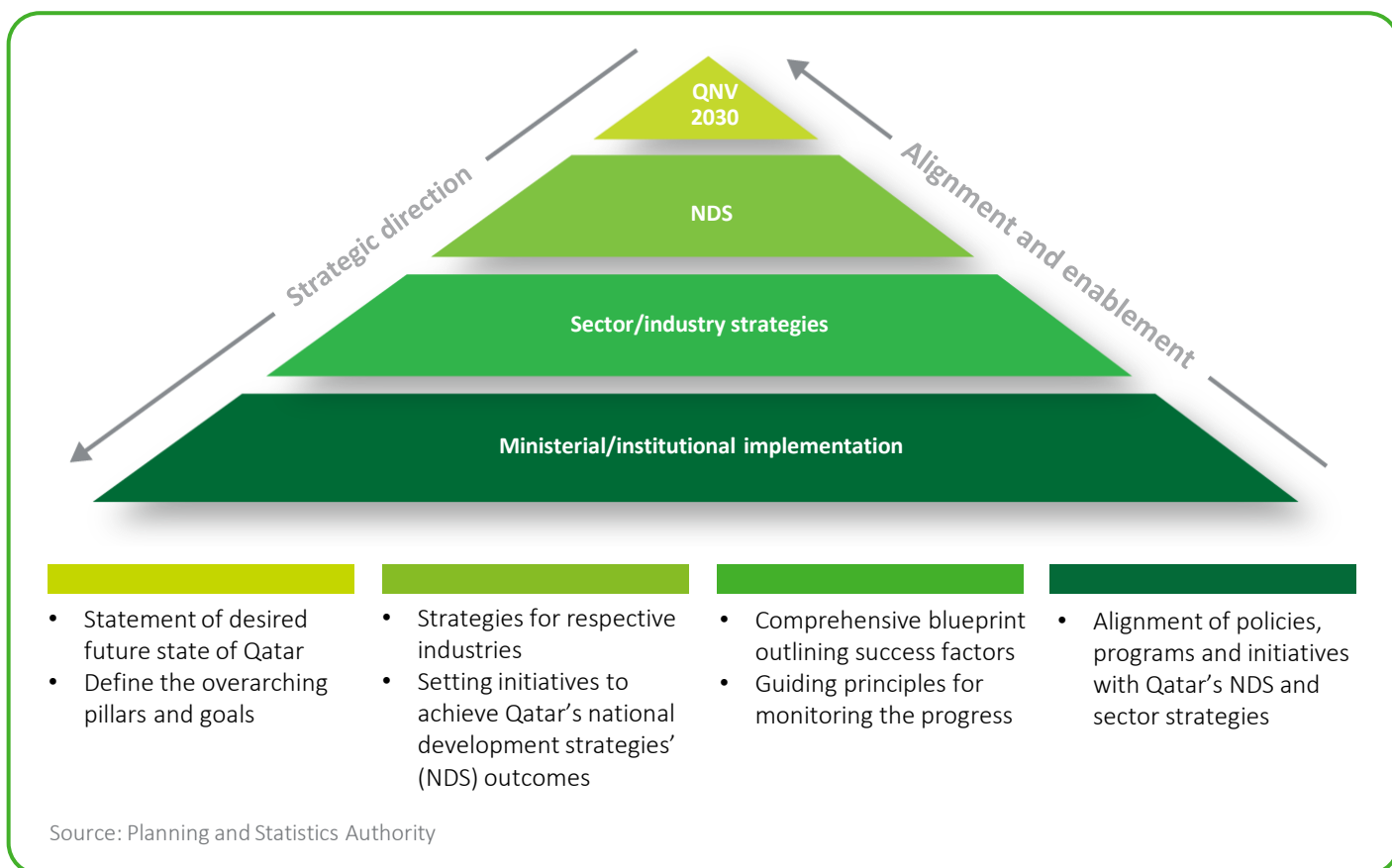
NDS3 outlines a set of **ambitious targets** to be achieved by 2030, including an average economic growth of 4%, the attraction of US\$100 billion in foreign direct investment and the establishment of Qatar as a frontrunner in business environment and digital competitiveness.

Through this thought leadership piece, we explore the essential factors necessary for the **effective implementation of Qatar's NDS3**, ensuring the strategic goals are actively pursued and fully achieved by 2030.



Figure 1

The State of Qatar has a structured strategic planning framework that cascades vision targets down to government institutions



The State of Qatar has experienced significant economic development over recent decades. In 2008, it established the Qatar National Vision 2030 (QNV 2030), a strategic framework designed to guide the country's growth and future objectives. QNV 2030 presents a detailed vision for sustainable development across economic, social, human and environmental areas.

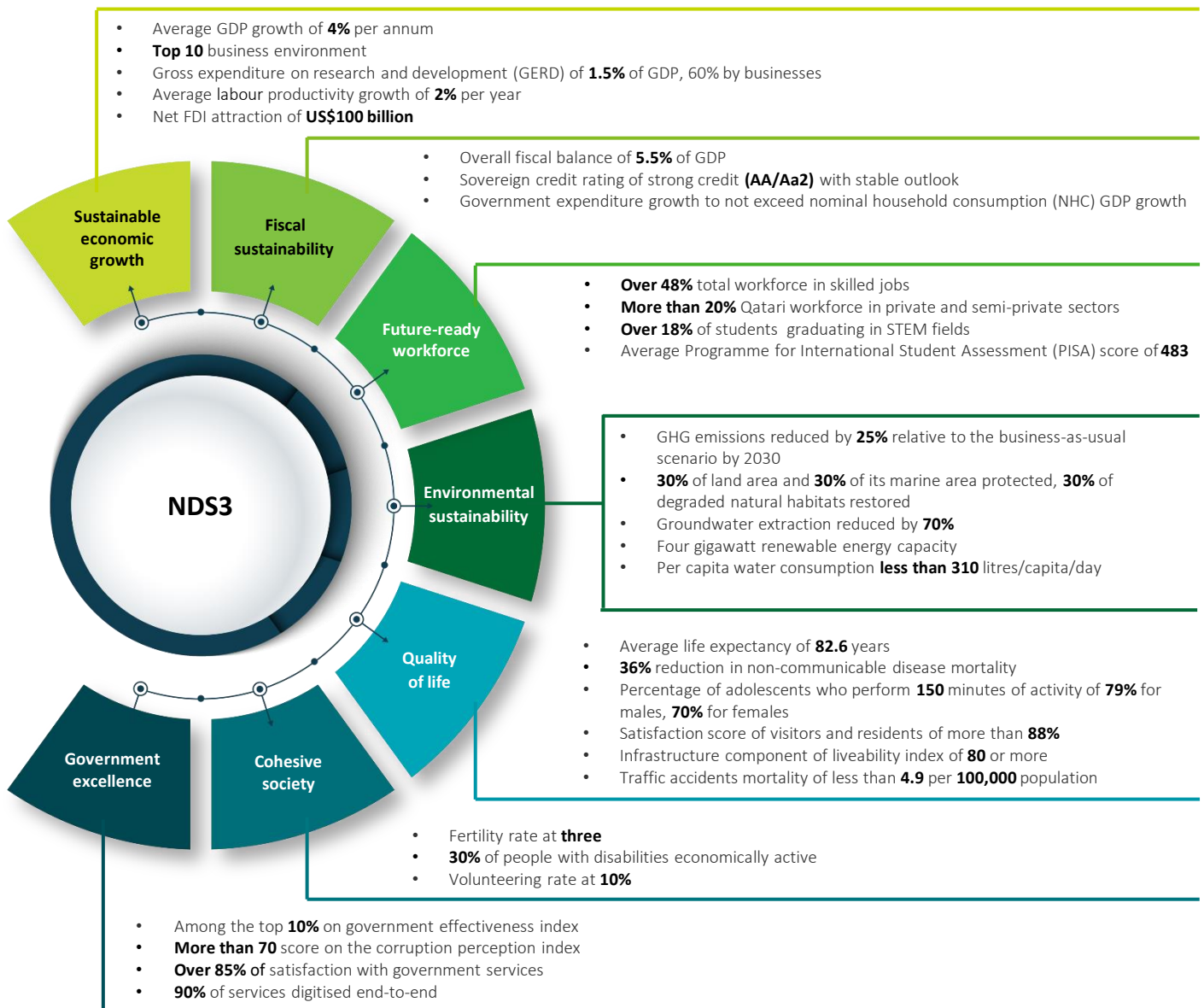
Further detailing of QNV 2030 is accomplished through national development strategies. These strategies provide milestones toward the vision's long-term objectives, setting specific targets for diverse sectors and offering a roadmap for ministries and sectors to tailor their individual plans.

A central focus of Qatar's National Vision is the shift from a reliance on oil and gas to a diversified economy. This is being achieved through the focus on becoming a knowledge-driven economy, emphasising education, skill enhancement and innovation to foster economic diversity. Strategic investments in educational infrastructure and a supportive environment for research and development mark this shift. The nation is also empowering women by promoting greater workforce and educational participation, integral to realising the comprehensive goals set out in its National Vision 2030.



Figure 2

Qatar's NDS3 has set ambition targets to be met by 2030, in-line with the wider ambitions of QNV 2030



Source: Planning and Statistics Authority

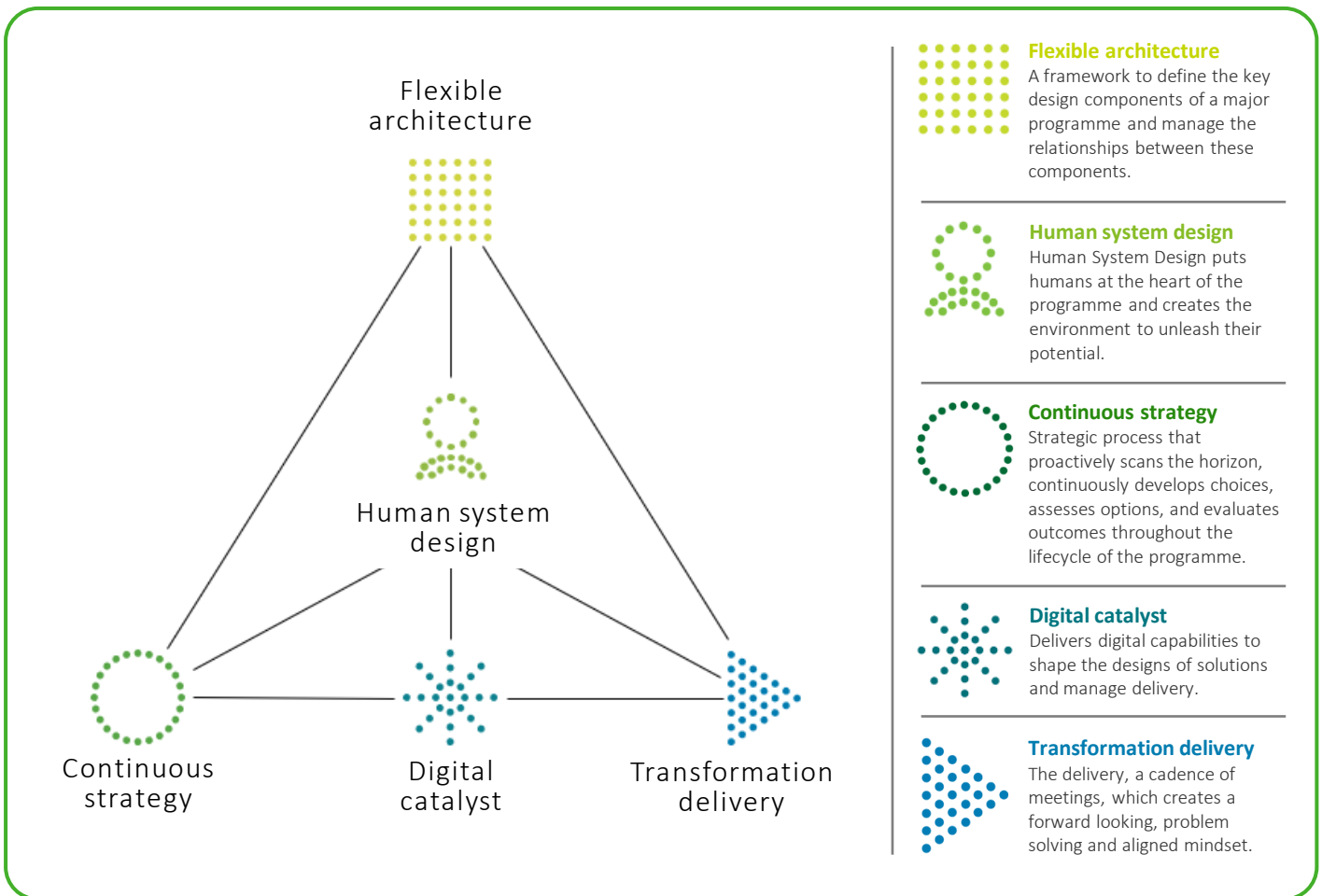
The recently announced Qatar's NDS3 is the final phase of realising QNV 2030, setting a series of ambitious targets by 2030 that span across various facets of national development and will require unified efforts across government institutions and private players to realise them.

This major programme sets robust economic targets, including achieving 4% annual gross domestic product (GDP) growth, attracting US\$100 billion in net foreign direct investment (FDI) and ranking among the top 10 business environments. Complementing these are environmental goals such as reducing greenhouse gas emissions (GHG) by 25%, protecting 30% of natural land and marine areas and limiting water

consumption to 310 litres per capita daily. Human development is also key, with the strategy aiming for over 46% of the workforce to be skilled, 20% of Qataris to work in the private sector and 18% of students to graduate in science, technology, engineering and mathematics (STEM) fields. Societal objectives focus on a cohesive society with improved quality of life indicators such as a fertility rate of three, increased economic activity among people with disabilities and a higher life expectancy of 82.6 years. The plan underscores governance excellence, targeting top rankings in government effectiveness and digitalisation of services.

Figure 3

Five key components are essential to ensure a successful delivery of NDS3



The focus has now shifted to the implementation of NDS3, a significant programme requiring unified efforts from both public and private stakeholders to ensure its successful completion. In detailing our approach to the critical factors, we will draw upon our experience in executing similar programmes, our in-depth knowledge of the Qatari market and Deloitte’s Programme Aerodynamics® framework.

This framework emphasises five crucial elements vital to the success of major programmes:

- Programme's architecture: establishes a robust and flexible operating model and governance
- Capacity for ongoing strategic planning: responsive to economic shifts
- Effective transformation delivery capabilities: drive change and facilitate informed decision-making

- Digital catalyst: integrates, streamlines and forecasts risks and performance
- At its core, a human system design: ensures the right resources support the programme's progression and execution

Together, these elements constitute a holistic model that provides the NDS3 implementation pathway with the essential mechanisms to successfully achieve the stipulated targets.

Figure 4

Achieving excellence in these key components ensures the robust and effective delivery of NDS3


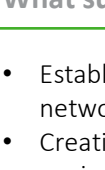
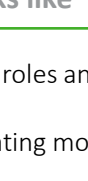
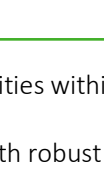
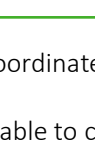
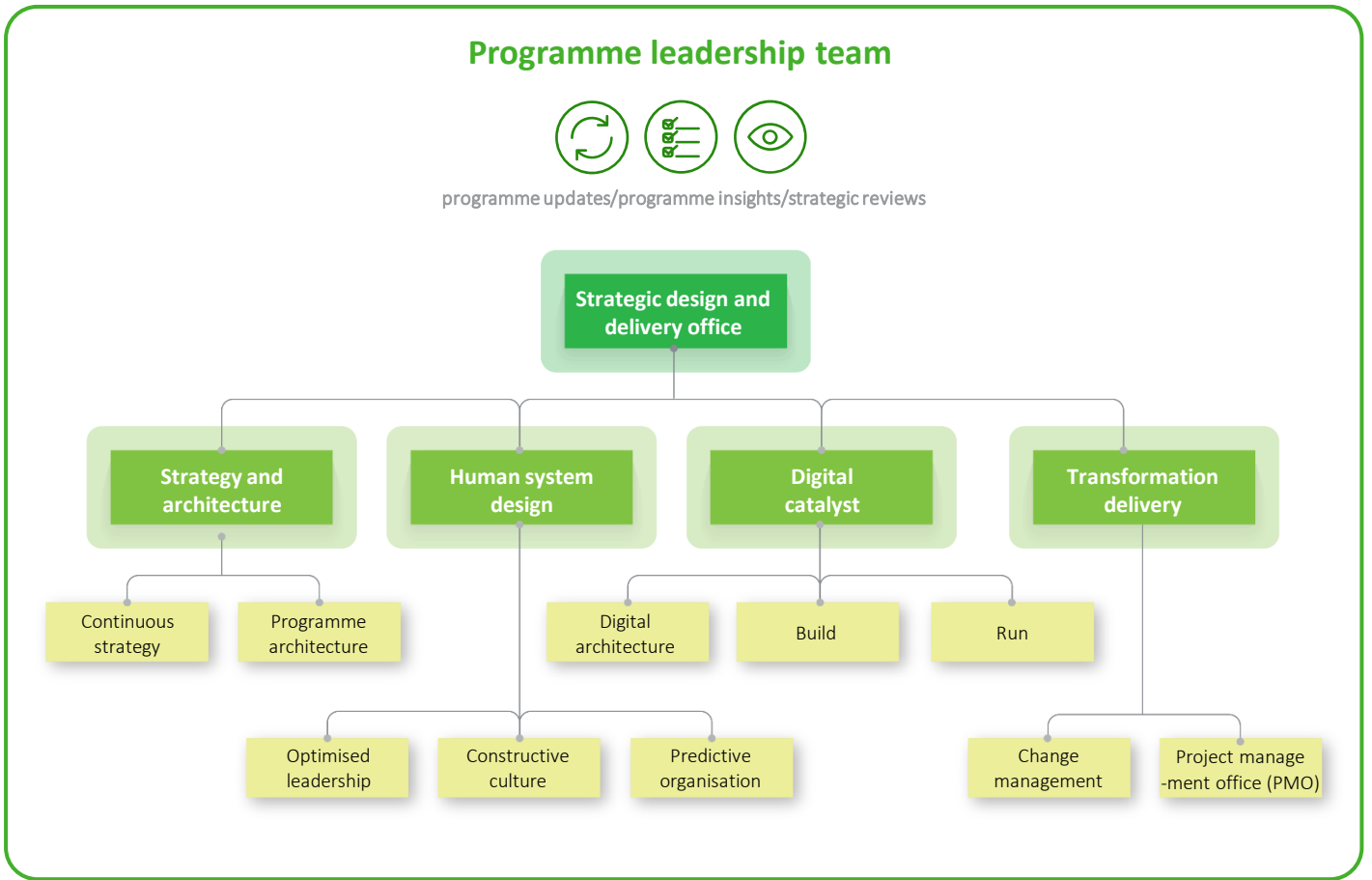
Key factors	What success looks like
 <p>Flexible architecture</p>	<ul style="list-style-type: none">• Establishing clear roles and responsibilities within a well-coordinated stakeholder network• Creating an operating model that is both robust and adaptable to changes in the environment• Ensuring strong governance with a structure that facilitates effective cross-sector collaboration and stakeholder engagement• Implementing detailed processes for governance, procurement and information systems that are optimised for delivering strategic objectives
 <p>Human system design</p>	<ul style="list-style-type: none">• Fostering a leadership culture that is cohesive and performance-driven, evolving with programme phases• Designing adaptable and scalable programme structures that accommodate diverse team dynamics• Ensuring all parts of the programme are infused with a clear understanding of their roles and contributions to the overall strategy• Cultivating an environment that encourages early adoption of innovations, with training and development to equip teams with the necessary skills
 <p>Continuous strategy</p>	<ul style="list-style-type: none">• Regularly reviewing and updating strategic direction to ensure alignment with evolving objectives• Proactively identifying and mitigating risks, while capitalising on emerging opportunities• Adapting to new information by adjusting strategic direction to maintain relevance and effectiveness• Employing rigorous assessments to fully understand the volatility and complexities involved, informing strategic planning and timely interventions
 <p>Digital catalyst</p>	<ul style="list-style-type: none">• Integrating advanced analytics and emerging technologies, such as simulation and digital twins, to provide actionable insights• Employing AI and machine learning for predictive analysis, enhancing foresight into programme outcomes and risks• Developing digital tools that streamline programme processes and foster innovative solution designs
 <p>Transformation delivery</p>	<ul style="list-style-type: none">• Utilising standardised tools and services for balanced programme control and sustained momentum• Driving integrated executive actions that enable swift and informed decision-making• Coordinating effectively across diverse stakeholder groups to maintain alignment with the programme's goals• Instituting consistent cadence meetings to ensure informed stakeholder engagement and timely decision-making

Figure 5

SDDOs can be set up to deliver on the five key factors and support in realising NDS3 targets



To effectively action the five core elements of Programme Aerodynamics, strategic design and delivery offices (SDDOs) can be established at various levels within the NDS3 framework, tailored in size and function to their specific operational layer.

At the apex of the NDS3 programme, the SDDO takes on a pivotal role in driving, integrating and facilitating decision-making at the national level. This central SDDO ensures that strategic directives are aligned with the State's objectives and effectively disseminated. At the sector or ministry level, SDDOs carry similar responsibilities but with a more targeted approach, focusing on the nuances and specifics of their respective domains.

This structured network creates a robust 'delivery engine' that propels and synchronises the programme's efforts across all stakeholders, optimising the likelihood of achieving NDS3's ambitious goals. Drawing parallels with regional initiatives, Saudi Arabia's establishment of 'Vision Realization Offices' across various entities exemplifies a comparable approach to ensuring strategic outcomes.

SDDOs are fundamental to the successful delivery of NDS3, serving as critical nerve centres that ensure strategic alignment and operational excellence.

“Through NDS3, Qatar transitions into the next phase of its development, shifting towards a sustainable economic future driven by its citizens, residents and the private sector, while maintaining our values, identity and social fabric”.

H.E. Sheikh Mohammed bin Abdulrahman bin Jassim Al-Thani

Prime Minister and Minister of Foreign Affairs

As the State of Qatar moves NDS3 from strategic planning to implementation, it is crucial to leverage insights gained from previous phases and excel in the five key factors of Programme Aerodynamics. This approach is vital for realising the ambitious goals of NDS3 and QNV 2030.

Establishing SDDOs throughout the various levels of NDS3 and among stakeholders can serve as pivotal 'delivery engines'. These offices will play a central role in steering the execution, fostering collaboration and enabling rapid decision-making across the ecosystem, turning ambitions into a reality.

Key contacts

Laky Chhina

Partner

Financial Advisory Leader
Qatar
lchhina@deloitte.com

Hassan Elrayes

Partner

Value Creation Services
helrayes@deloitte.com

Ala Tuffaha

Partner

Major Programmes
atuffaha@deloitte.com

Rami Khalaf

Partner

Consulting
rkhalaf@deloitte.com

Mohamed Jwili

Assistant Director

Value Creation Services
mjwili@deloitte.com





This publication has been written in general terms and therefore cannot be relied on to cover specific situations; application of the principles set out will depend upon the particular circumstances involved and we recommend that you obtain professional advice before acting or refraining from acting on any of the contents of this publication.

Deloitte & Touche – Qatar Branch would be pleased to advise readers on how to apply the principles set out in this publication to their specific circumstances. Deloitte & Touche – Qatar Branch accepts no duty of care or liability for any loss occasioned to any person acting or refraining from action as a result of any material in this publication.

Deloitte & Touche (M.E.) (DME) is an affiliated sublicensed partnership of Deloitte NSE LLP with no legal ownership to DTTL. Deloitte North South Europe LLP (NSE) is a licensed member firm of Deloitte Touche Tohmatsu Limited.

Deloitte refers to one or more of DTTL, its global network of member firms, and their related entities. DTTL (also referred to as “Deloitte Global”) and each of its member firms are legally separate and independent entities. DTTL, NSE and DME do not provide services to clients. Please see www.deloitte.com/about to learn more.

Deloitte is a leading global provider of audit and assurance, consulting, financial advisory, risk advisory, tax and related services. Our network of member firms in more than 150 countries and territories, serves four out of five Fortune Global 500® companies. Learn how Deloitte’s approximately 457,000 people make an impact that matters at www.deloitte.com.

DME is a leading professional services organization established in the Middle East region with uninterrupted presence since 1926. DME’s presence in the Middle East region is established through its affiliated independent legal entities, which are licensed to operate and to provide services under the applicable laws and regulations of the relevant country. DME’s affiliates and related entities cannot obligate each other and/or DME, and when providing services, each affiliate and related entity engages directly and independently with its own clients and shall only be liable for its own acts or omissions and not those of any other affiliate.

DME provides services through 23 offices across 15 countries with more than 7,000 partners, directors and staff. It has also received numerous awards in the last few years such as the 2022 & 2023 Great Place to Work® in the UAE, the 2023 Great Place to Work® in the KSA, and the Middle East Tax Firm of the year.