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Qatar ICT - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 100 pages | Mordor Intelligence

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Report description:

Qatar ICT Market Analysis

The Qatar ICT market was valued at USD 17.51 billion in 2025 and estimated to grow from USD 19.91 billion in 2026 to reach USD 37.74 billion by 2031, at a CAGR of 13.7% during the forecast period (2026-2031). Rapid 5G roll-out, sovereign cloud investments, and mandatory Arabic large-language-model (LLM) development are accelerating enterprise digitization, while the National Digital Agenda 2030 channels more than USD 2.47 billion of public funds into next-generation infrastructure . Communication Services remain the revenue backbone as telecom operators densify networks ahead of the Asian Games 2030, yet Cloud Services post the steepest growth thanks to data-sovereignty-compliant hyperscale launches by Microsoft and regional carriers. Intensifying competition among Ooredoo, Vodafone Qatar, and global hyperscalers is spurring price innovation in managed security, edge, and GPU hosting, opening fresh opportunities for domestic software firms that localize Arabic applications. On the demand side, banking, energy, and public administration projects dominate contract value, but esports venues and smart-manufacturing pilots signal emerging pockets of high-margin spend.

Qatar ICT Market Trends and Insights

Accelerated 5G roll-out and network densification

Vodafone Qatar's 2025 agreement with Nokia is modernizing the nationwide radio and core layers to support low-latency 5G slicing for industrial IoT and 8 K streaming, aligning with the regulator's December 2025 3G sunset that frees up spectrum for enhanced mobile broadband. Parallel trials by Ooredoo using Wi-Fi 7 over fiber deliver four-fold throughput gains, reinforcing Qatar's ambition to provide 10 Gbps residential access and bolster enterprise edge computing . These upgrades enable smart-stadium analytics and autonomous shuttle pilots for the Asian Games 2030, reinforcing Qatar ICT market growth prospects.

Government Digital Agenda 2030 capital spending

The Third National Development Strategy allocates multi-year funds so that digital public services account for at least 90% of citizen transactions by 2030. Key programs include a five-year partnership with Scale AI covering more than 50 AI use cases, and the launch of a National Cyber Security Academy to train local talent. Spending commitments extend to quantum-ready research and new sovereign-cloud regions, anchoring long-run demand for consulting, integration and secure hosting capacities within the Qatar ICT market.

Acute cyber-skills shortage inflating wage bills

Despite the National Cyber Security Agency's training academy, demand for qualified analysts outstrips local supply, forcing enterprises to import talent at wage premiums above regional norms. The situation is acute in energy and banking, where critical-infrastructure audit deadlines create time-sensitive hiring spikes. Elevated labor costs erode margins for managed security providers and could temper Qatar ICT market expansion if unaddressed.

Other drivers and restraints analyzed in the detailed report include:

Rapid cloud take-up within the BFSI sectorMega-events pipeline boosting ICT demandHeavy reliance on foreign OEMs raising lifecycle TCO

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Communication Services generated the largest share of Qatar ICT market revenue at 41.35% in 2025, reflecting sustained mobile-data demand, fiber roll-outs and wholesale transit fees. The segment benefits from mandatory VoLTE migration and 5G enterprise slicing, providing steady cash flow for network operators. Conversely, Cloud Services exhibit the fastest 21.7% CAGR as hyperscale regions and local sovereign-cloud zones allow banks and ministries to comply with data-residency law 13-2016. Robust GPU demand for Arabic LLMs and AI-driven customer interaction further boosts cloud uptake. IT Hardware sales track densification cycles across mobile and data-center footprints, while Software growth is propelled by low-code platforms that local firms adapt for Arabic interfaces.

Historical spending showed Communication Services navigating margin compression through bundle innovations, whereas present momentum clearly favors cloud elasticity. Market players are increasingly combining managed security with unified communications to defend share. Local system integrators align with the sovereign-cloud push, creating cross-sell opportunities into analytics and workflow software. The sector's shift aligns with National Digital Agenda targets that prioritize cloud-delivered public services, lifting the Qatar ICT market size for XaaS offerings more sharply than for legacy hardware.

Large enterprises controlled 71.30% of 2025 spend, fueled by mega-project budgets within government, energy and aviation. Their roadmaps encompass ERP cloud migration, zero-trust security and AI-augmented workflows worth tens of millions of USD per contract. However, SME digital programs backed by Qatar Development Bank subsidies propel a 12.3% CAGR, signaling a gradual re-balancing of the Qatar ICT market. Lower entry costs for SaaS, simplified e-invoice mandates and marketplace access entice micro-firms to adopt accounting and CRM clouds.

For incumbents, hybrid-cloud governance and localized data-lake architectures are key procurement criteria. SMEs, in contrast, prioritize pay-as-you-go platforms bundled with cybersecurity baselines, narrowing the digital divide. Channel partners offering turnkey e-commerce and payment APIs capitalize on this wave. Over time, SME digital maturity is expected to unlock indigenous app-development talent, reinforcing the government's ambition to generate 26,000 ICT jobs and broadening the Qatar ICT market addressable base.

The Qatar ICT Market Report is Segmented by Product Type (IT Hardware, IT Software, and More), Enterprise Size (Small and Medium-Sized Enterprises, Large Enterprises), Industry Vertical (Government and Public Administration, and More), Deployment Mode (On-Premises, Cloud-Only, Hybrid), and Geography (Qatar). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Accenture Middle East (Qatar) W.L.L. Amazon Web Services Middle East (Qatar) W.L.L. Atos SE (Qatar LLC) Cisco Systems, Inc. (Qatar) Ericsson AB (Qatar Branch) Gulf Bridge International Q.S.C. Huawei Technologies Co., Ltd. (Qatar) Infosys Limited (Qatar Branch) International Business Machines Corporation Microsoft Corporation (Qatar) Ooredoo Q.P.S.C. Oracle Corporation SAP SE (Qatar) Tech Mahindra (Qatar) LLC Vodafone Qatar P.Q.S.C. Vistas Global Qatar LLC Workz Group (Middle East) FZE Wipro Doha LLC ZTE Corporation (Qatar)

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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