

QATAR OVERVIEW





We believe in the economic potential of Qatar and many Qatari clients already see Oliver Wyman as an engaged and collaborative partner. With the establishment of our office in Doha, we pay tribute to the excellent business opportunity and potential we see for sustainable growth in this market.

Pedro Oliveira

Managing Partner IMEA Region, Oliver Wyman



Throughout the 15+ years we have worked in Qatar, Oliver Wyman has maintained a strong focus on local impact. Our Doha office, established in 2019, reinforces our commitment to Qatar and enhances our ability to provide impactful advice and solutions. We bring unique capabilities specifically tailored to our Qatari clients, powered by a diverse, passionate, and experienced set of colleagues.

Jad Haddad

Partner and Qatar Office Head, Oliver Wyman

A GLOBAL OVERVIEW

Oliver Wyman is a global leader in management consulting. With offices in 60 cities across 29 countries, Oliver Wyman combines deep industry knowledge with specialized expertise in strategy, operations, risk management, and organization transformation.

The firm's 5,500+ professionals help clients optimize their business, improve their operations and risk profile, and accelerate their organizational performance to seize the most attractive opportunities.

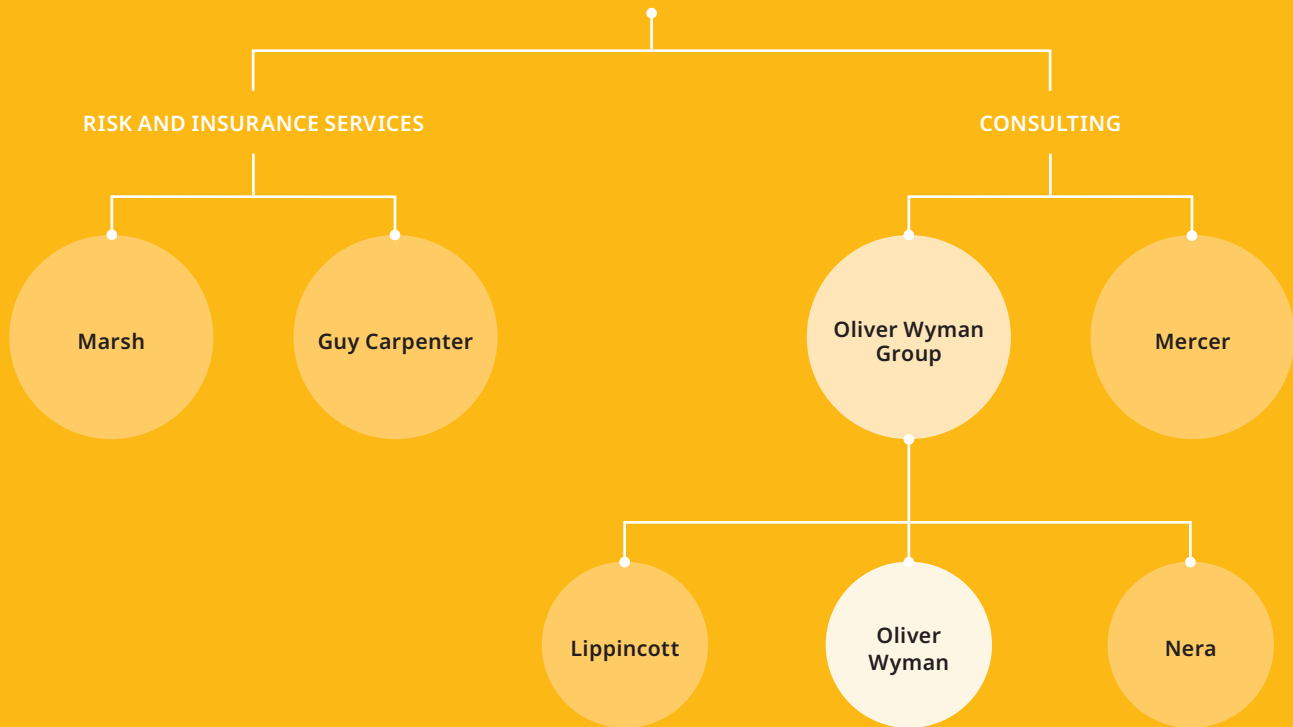


OUR IMPACT



Clients turn to us for help solving their most pressing issues. Whether their challenge is to find new avenues of growth, optimize operations, improve their risk profile, or inspire the organization to act in different ways, clients look to us for insight and tangible results.

PART OF MARSH McLENNAN COMPANIES



As part of Marsh McLennan, Oliver Wyman Group is able to draw on experts from our operating businesses in the areas of human capital (Mercer) and insurance (Marsh and Guy Carpenter).

The Group also contains Lippincott, a leading brand strategy and design consultancy, and NERA, a leading provider of economic analysis regarding highly complex business and legal issues.



VALUE PROPOSITION

Our value proposition is focused on breakthrough impact for our clients.

OUR ANALYTICS

Impactful business insights using next-generation data science, analytics, and AI techniques

Visionary digital propositions through analytics powered by sustainable enterprise-grade infrastructure solutions

Faster time-to-impact with practicality and efficacy to de-risk and accelerate digital execution

OUR RELATIONSHIPS

A commitment to **deliver impact** and become clients' **trusted partners**

A broad and unique network of experts that includes advisory boards, alumni, and academics

Substantial leverage of the strength of Marsh McLennan businesses, people, and expertise

OUR PEOPLE

In-depth and highly collaborative experts to bring integrated perspectives across the industry

Diverse teams of experts with a deep multitude of skills and know-how

Expertise at the core through unparalleled industry specialists with hands-on experience in making change happen

OUR IDEAS

Industry-shaping insights stemming from specialized industry expertise

An innovative approach to generate breakthrough ideas that move the dial

Co-creation and design-thinking methodologies via tight linkage to our experts

RECENT PUBLICATIONS



INSIGHTS

GCC DIGITAL TRENDS FOR 2021

Our Expertise > Insights > GCC Digital Trends for 2021

2020 proved to be a year of disruption, with the last months of the year hitting buttons on digital transformation. What does this mean for 2021? Our team of experts share their predictions for Digital Trends for 2021 in the GCC.

The GCC will continue to be the region with the highest percentage of digital transformation in 2021 vs. 89% in high income countries. The number of data centres by global cloud providers is estimated to increase by 25% in 2021 vs. 2020. 5G penetration (the percentage share of total mobile connections) expected to reach 10% in 2021 vs. 2020. AI and cloud adoption is expected to accelerate the ongoing implementation of digital transformation.

TAKING BACK CONTROL

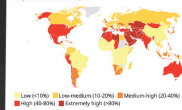
Opportunities for integrated water management

Our Expertise > Insights > Taking Back Control

25 percent of the world's population is currently living in areas of extremely high water stress, and by 2050 that portion of the population will more than double, according to Oliver Wyman estimates.

Combating water scarcity is about managing and optimizing the use of available water resources across time and space. Technology and infrastructure play a critical role and can help to reduce the impacts of water scarcity in some regions.

Key water stress hot spots



CAPABILITY

Strategy

Risk Management

AUTHORS

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OLIVER WYMAN IDEAS HUB

Oliver Wyman Ideas offers our most recent insights on issues of importance to senior business leaders.

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IMPLEMENTATION OF SUSTAINABLE DEVELOPMENT GOALS

Addressing the data disaggregation challenge in the GCC

Saf Gamalath
Jeff Yousof
Johanna Salameh

AI FOR GOVERNMENTS

Our Expertise > Insights > AI for Governments

Oliver Wyman estimates that the use of artificial intelligence (AI) technology can save governments up to 10% of their annual budgets.

SHAPING THE NEW NORMAL

Changing working practices for good

This was first published on July 5, 2020.

Editor's note: Oliver Wyman is monitoring the COVID events in real-time and we have compiled resources to help our clients and the industries they serve. Please continue to monitor the Oliver Wyman Coronavirus hub for updates.

The COVID-19 pandemic is changing life as we know it. There are few, if any, aspects of day-to-day life - how we socialize, travel, and work - that have not in some way been altered for good or the foreseeable future. The disruption brought about by the pandemic also offers a unique opportunity for organizations to re-calibrate routines and ways of working. From virtual conferencing, to shifting business models online, many positive new activities have emerged. As consumers and employees return to their previous ways of life, they are making conscious decisions every day about whether to embrace tenuous new habits that were formed under lockdown conditions, or to return to the previous well-established work patterns.

For organizations that saw significant disruption during COVID-19 lockdowns, every day that passes without a concerted effort to acknowledge, assess and activate new practices and routines represents a risk of lost opportunity, along with the likelihood that many of these new ways of working will themselves lapse if we do not actively shape the post-COVID environment that we are starting to enter.

In this paper, we describe how these new practices can be embedded relatively quickly if repeated in a consistent context, as part of a consistent routine, in response to a recurring trigger. Once these practices become embedded, they can be difficult - and in some cases, nearly impossible - to break. We also set out how organizations can actively support the 'new normal' by setting out a framework

A photograph of a modern suspension bridge with a large circular archway, spanning a body of water. The bridge is illuminated, and the sky is a mix of orange and blue, suggesting sunset or sunrise. In the background, a tall building is visible. The foreground shows rocky terrain.

OLIVER WYMAN IN QATAR

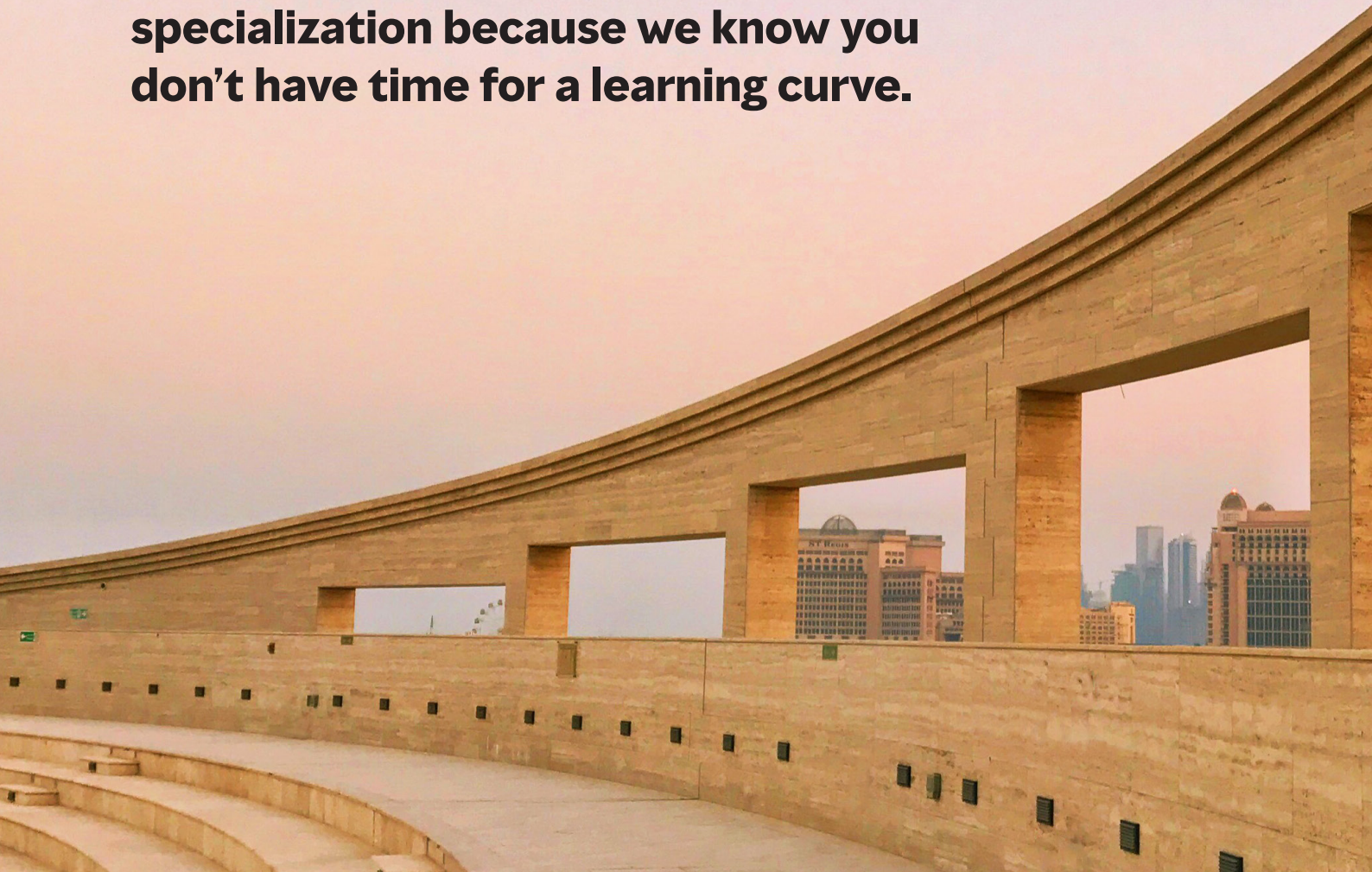
We have a broad range of skill sets and expertise and a solid history of supporting the country in a variety of assignments.

Qatar's rapid growth has presented multiple business opportunities. Oliver Wyman's Doha office was established in 2019 to provide advice and solutions in all aspects of strategy consulting across industries. We offer these services to a number of clients across the public and private sectors.

Our current industry focus in Qatar includes the public sector, financial services, communications, media & technology, digital, energy & natural resources, health & life sciences, transportation, implementation and social impact. We have a broad range of skill sets and expertise and a solid history of supporting the region in a variety of assignments, including growth development, reorganization, and turnaround strategies.

INDUSTRY COVERAGE

We are committed to industry specialization because we know you don't have time for a learning curve.



Public Sector & Policy

Oliver Wyman has assisted governments globally, with engagements in more than 30 countries on 5 continents. Our partners are focused on public sector and policy as well as, global advisory board of ex-government officials. The breadth of our offering is unrivalled, making us the top public sector advisor in the region.

We understand the intricacies of policy design and formulation, and of implementing change in the public sector. We have practical experience making a difference at the centre of prominent governments, in agencies and ministries, and other public-sector organizations for whom we have delivered more than 400 projects.

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

Design a new Individual Performance Management (IPM) system for a Qatari ministry

Develop the launch strategy, governance, and operating model of a new authority

Assess the performance of Qatar across all government functions

Support the launch of a new Qatari agency focused on attracting FDI

Financial Services

We have unparalleled understanding of the evolving market structures and strategic trends in financial services, across both public and private sectors, working with over 75 of the top 100 financial institutions and policy makers globally. In the region, our clients include leading commercial and investment banks, insurers, regulators, ministries of finance, tax authorities, central banks, sovereign wealth funds, pension funds, fintechs and investor groups.

Banking

Working with the largest regional banks on topics redefining the banking landscape including greenfield digital launches, digital transformations, fintech partnerships, modular banking, advanced data analytics capabilities as well as core banking subjects such as treasury and risk management

Fiscal

Working with regional finance ministries and tax authorities on their fiscal agendas including delivering end to end tax programs, diversifying non-oil revenue sources and implementing cost optimization programs

Asset and Wealth Management

Helping regional asset managers, sovereign wealth funds and pensions funds achieve their strategic ambitions; working on topics including investment or divestment strategies, improving operational efficiency and supporting M&A activities

Market Infrastructure

Supporting leading exchanges, clearing houses and payment providers on strategy design, improving market integrity support and privatization efforts; apart from established players we work with digital start-ups bringing best in class capabilities to the market infrastructure space

Insurance

Supporting regional insurers and reinsurers on strategy design and digital transformation topics; working closely with both established businesses looking to transform as well as new entrants pushing cutting-edge digital plays

Regulatory

Helping regional regulators deliver on both prudential and market development mandates; strengthening financial soundness and designing long term sector strategies

Communications, Media, Technology

Oliver Wyman is the leading advisor for companies and institutions in the Communications, Media, and Technology industries for developing growth strategies for commercial transformation, improving operations, transitioning to digital, and maximizing operational efficiency.

We work closely as trusted partners for the region's most successful companies and institutions: telecommunications providers, regulators, ministries, smart city leaders, consumer electronics companies, broadcasters, publishers, platform operators, and online and entertainment companies.

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*Develop the brand governance strategy of a major Qatari company**

Perform financial valuations of enterprise value for market acquisition

Develop transaction support for an investor looking at opportunities in the technology space

Develop 5-year business plan for sizing the potential revenues of a regional news and media player

* Work done with sister company Lippincott

Digital

We partner with clients to deliver breakthrough outcomes for their toughest digital challenges.

We blend the power of digital with deep industry expertise to tackle disruption and create impact. By building strong capabilities and culture, we accelerate and embed digital transformation. Our people co-create and grow customer-focused solutions that win. We modernize technology and harness value from data and analytics. We build resilience so our clients are ready for tomorrow's risks and optimize operations for the future. Above all, we work collaboratively with our clients' leaders, employees, stakeholders, and customers to jointly define, design, and achieve lasting results.

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

Develop a refreshed Smart Sector Strategy for a Qatari digital transformation program

Develop a strategy design for a digital platform for foreign investors

Develop use cases & digital inclusion strategy for a Qatari digital transformation program

Energy & Natural Resources

Oliver Wyman advises clients along the end-to-end Energy value chain as well as Metals and Mining. We work closely with large NOCs and IOCs, Petrochemical Companies, Utilities and Mining companies across the public and private sector.

Our Practice has been working at the forefront of Energy topics, shaping the Energy transition and driving the most recent global multilateral G2G energy agenda.

With our presence in Qatar, we offer our clients a unique set of capabilities ranging from developing growth and sector strategies, operating model transformation, M&A and Post Merger Integration supply chain and operational excellence, local content development, trading capabilities build-up, sales and marketing strategies, risk management and large-scale transformation management.

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

Support a major Qatari energy player with commercial negotiations

Led the clean team for regional-global chemicals M&A transaction and supported in the PMI process

SmartGrid and AI transformation for a large utility in the GCC

Health & Life Sciences

Oliver Wyman's Health & Life Sciences practice has been founded on the ambition of innovating and transforming health systems around the world. Our clients range from hospital providers and pharmaceutical companies to Ministries of Health.

Our consulting approach is evidence-based and outcome-focused: We help deliver both clinical improvements and financial sustainability in an industry environment that often regards those objectives as trade-offs. The majority of our clients are repeat clients. We advise them on topics like strategy development, operational improvement and implementation support, and we often work in non-traditional work arrangements (e.g., BOT models).

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

Manage the development, implementation, and launch of a nationwide healthcare solution

Design and implementation of COVID-19 response processes and solutions to monitor outcomes

Design of the multi-year value-for-money transformation roadmap for a regional public healthcare system

Transportation

Oliver Wyman is a leading advisor for the IMEA transportation & services industries. We offer our corporate clients deep expertise in aviation, rail, maritime and logistics services as well as in tourism and today's mobility sectors. Equally, we address the challenges of managing the strong sector growth for and together with government organizations and regulators in the region. We provide advice in strategy development, growth planning, pricing and revenue management as well as organizational transformation, efficiency improvement and M&A.

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

Strategy support for a Qatari digital transformation program

Benchmarking of market positioning and performance of a major player in the transportation space

Strategy and business plan for the aviation sector of a large infrastructural development in the region

Implementation

We support our clients in translating their strategies from ideas into groundbreaking impact. We have deep understanding of strategy as well as the expertise and experience to transform it into material and sustainable results. Our approach is focused on enabling our clients to execute their strategies successfully over the long term, by working closely with their teams and by building their internal capabilities. We cater to each client's situation and tailor our approach to meet their specific needs.

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

Supervised the development lifecycle and launch support of multiple digital solutions for a Qatari digital transformation program

Develop an AI-powered decision support tool and recommendation engine for a Qatari ministry

Supervised the implementation, and launch support for a digital platform for foreign investors to connect with local businesses, find opportunities, and establish long-lasting business relationships



SOCIAL IMPACT

Oliver Wyman partners with organizations across the continent whose work improves communities and lives around the world through microfinance, healthcare, education, global economic development, the arts, and much more.

REPRESENTATIVE REGIONAL PROJECTS INCLUDE

Survey of youths and employers in 13+ countries across the MENA region, in order to get each party's perspective on the labour market, its opportunities and challenges

Develop sustainable cities in post-crisis countries in the Arab States

Develop a white paper about the role of the private sector in achieving SDGs in a GCC country

Prepare a survey for businesses on how to improve self-reporting in sustainability in a GCC country

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