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FROM INNOVATION TO COMMERCIALIZATION

CONFIDENTIAL

Q1 2026

The National Industrial Development Vehicle

Executive Summary for Institutional Due Diligence

This registry presents the consolidated pipeline of **12 sovereign industrial mandates** curated under the National Industrial Development Vehicle (NIDV).

Each mandate is anchored by verified principals with established manufacturing operations, structured for Qatari localization across critical strategic verticals—from aerospace and defense to biotech and sovereign AI infrastructure.

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*Prepared by **Fanar Qatar** · Institutional & Sovereign Advisory · Doha, State of Qatar*

12	~300,000 SQM	$ One Billion +	3 Nations
Active Mandates	Aggregate Land Footprint	Confirmed CAPEX Pipeline	Principal Origins



Complete Mandate Pipeline

The following table details all twelve mandates under active structuring, including estimated land allocation within Qatar Free Zones and projected capital expenditure for Phase 1 deployment.

#	Principal & Strategic Vertical	Industrial Mandate	Principal Origin	Est. Land (SQM)	Est. CAPEX (USD)	Status / Documentation
1	Aerospace(Q-SAIP)	Qatar Airways Localization Program + MRO - Sovereign Aviation Manufacturing Program	Türkiye	15,000 – 25,000	$400M+	Executed Tripartite MoU (MKT/Synergia) and Pre-feasibility Executed & Confirmed
2	QALIBER GLOBAL	Halal Cosmetics, Personal Care & Wellness Product Manufacturing-Halal Science	Malaysia	20,000 – 35,000	$157M – $239M	Executed MoUs (x4 Leading Malaysia-based Halal Manufacturer Principals)
3	(DHDH)	HOSPITALITY Interior Design, Sourcing, Manufacturing & Procurement Center	Global Hub	90,000 – 140,000	$180M – $220M	Platform Mandate Ready for Submission
4	NEBULA DOHA	Digital Foundry	Türkiye	2,000 (Office)	$12.5M – $15M	Platform Mandate Ready for Submission
5		Defense/Electronics	Türkiye	4,000 – 6,000	$23.0M	MoU + Pre-Feasibility Executed & Confirmed
6		Mobility/Smart Cities/EV	Türkiye	5,000 – 8,000	$18.0M	MoU + Pre-Feasibility Executed & Confirmed
7		Biotech/Polymers	Türkiye	6,000 – 10,000	$88M – $90M	MoU + Pre-Feasibility – Pending - Email Confirmation Received for FQ Collaboration
8		FOUNDRY Q-Robotics/AI	Malaysia	5,000 – 7,000	$11.5M – $19M	MoU + Pre-Feasibility Executed & Confirmed
9		Sovereign Data	Malaysia	2,500 – 4,000	$60.0M (3-Yr)	MoU + Pre-Feasibility Executed & Confirmed
10		MedTech/Devices	Malaysia	25,000 – 40,000	$100M	Executed MoU 3 to 5 Projects
11		INN SAVUNMA-Defense MedTech	Türkiye	18,000 – 22,000	$30.05M	MoU + Pre-Feasibility Executed & Confirmed
12	Q-MCPESF (Power)	E-TECH ROBOTICS Energy/EV	Türkiye	4,000 – 6,000	$30M	MoU + Pre-Feasibility Executed & Confirmed
	TOTALS	Sovereign Cluster	TR / MY	~196k – 305k	$1.11B – $1.24B	100% Active Pipeline

The consolidated pipeline of 12 sovereign industrial mandates curated under the National Industrial Development Vehicle (NIDV).

1



QATAR AIRWAYS LOCALIZATION

2



HALAL PRODUCTS MANUFACTURING

3



HOSPITALITY INTERIOR DEIGN HUB

4



ELLIANCEADVANCED MANUFCATURING

5



ESTEK ROBOTICS

6



E-TECH BATTERY+ROBOTICS

7



MEDICAL DEVICE + MORE

8



10K ELECTRONICS –DEFENCE, CIRCUITS

9



BIOLIVE –OIL FROM PITS

10



ORTEM

11



INN SAUNMA – HEALTHCARE PRODUCTS

12



QATAR CLOUD – DIGITAL FOUNDRY

Institutional Notes for the Due Diligence Team

Technical Readiness

All 12 mandates are anchored by verified industrial principals with **existing manufacturing operations** in Türkiye or Malaysia. These are established SMEs seeking Qatari localization—not early-stage ventures.

Pre-Feasibility Status

The ORTEM and BioLive mandates (the "Industrial Core") have completed preliminary technical pre-feasibility, defining specific machinery, labor, and utility requirements for Doha deployment.

Land Requirements

Estimates are based on standard industrial plots in **Manateq (Qatar Free Zones)** or Mesaieed Industrial City, allowing for Phase 1 production and Phase 2 expansion.

CAPEX Composition

Figures include specialized industrial machinery, clean-room setups (MedTech/Electronics), initial raw material sourcing, and Industry 4.0 automation integration.

Sovereign Alignment

Every mandate reduces Qatar's import dependency in critical sectors: **Defense, Aviation, Healthcare, and Food/Wellness Security**.

TBD CAPEX Strategy

Three mandates—**Aviation MRO, MedTech/Devices, and Power/EV**—carry TBD designations by design. These are **High-Scale mandates** where final CAPEX is calibrated to sovereign appetite.

The investor determines the scale: for example, how much of the Qatar Airways supply chain to capture in Phase 1. This positions the principal as a strategic partner, not merely a capital allocator.

The Industrial Footprint

~300,000 SQM of aggregate industrial land constitutes a national-scale footprint. This registry represents a **City of Industry**—not a collection of isolated factories—anchored by ecosystem interdependency and sovereign strategic intent.