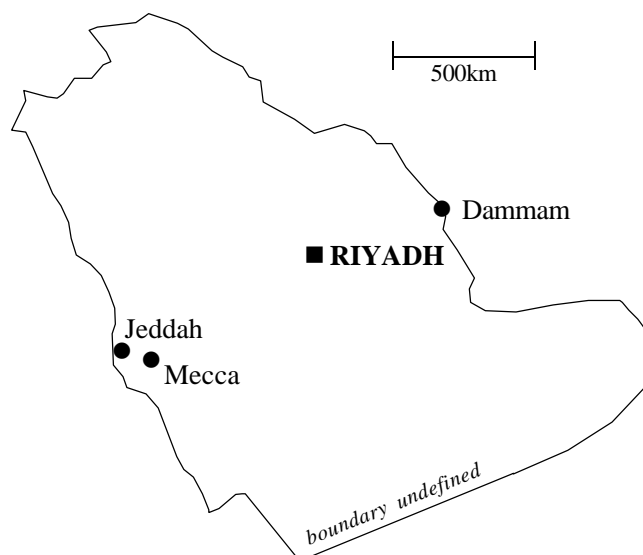


Saudi Arabia

Key data

Area (sq km):	2,150,000
Population (million):	21.5
Population per sq km:	10
Capital:	Riyadh
Population of capital:	1.3 million
Language:	Arabic
Exchange rate:	
- spot rate (10/02/00) SAR=USD1	3.75
- annual average (1999) SAR=USD1	3.75
GDP 2000 (USD billion - forecast):	140.9
GDP per capita 2000 (USD thousand):	6.56

Sources: FT, CIA Factbook, EIU



Political and economic profile

The Kingdom of Saudi Arabia occupies approximately four-fifths of the Arabian peninsula and borders Iraq, Jordan, Kuwait, Oman, Qatar, Yemen and the United Arab Emirates. It is an arid country with vast expanses of largely uninhabited desert and is subject to extreme changes in temperature. Due to the predominance of the oil and gas industries, around a quarter of Saudi Arabia's population is made up of foreign nationals. The country is divided into 13 administrative provinces called *mintaqat*. A large section of the border with Yemen remains undefined.

There are no political parties or elections in Saudi Arabia, as the country is governed by a hereditary monarch, who since June 1982 has been King Fahd bin Abd al-Aziz Al Saud. The King appoints a Council of Ministers - mainly from the royal family - to carry out governmental duties.

Saudi Arabia controls over a quarter of the world's oil reserves and its economy relies heavily on the price of oil; approximately 75% of budget revenues, 40% of GDP and 90% of export earnings come from the petroleum industry. During a slump in world oil prices in 1998 the country's GDP fell by around 11% and the government was forced to cut spending the following year. The authorities have attempted to diversify the economy in recent years in order to reduce the country's dependence on fossil fuel exports, but with little success; agriculture, for example, contributes only 6% of GDP and a shortage

of water for irrigation limits the possibility of self-sufficiency. Thanks to a Saudi-led drive to reduce production, oil prices rose in 1999 and the GDP registered a positive growth of around 2%. By early 2000 prices had reached their highest levels for nine years, leading to calls for production to be stepped up once again.

Unemployment is virtually non-existent, with around 25% of the workforce employed in the oil and gas industries. The major part of Saudi exports head eastwards to countries such as Japan and Korea, while the largest sources of imports are the US and the UK. Saudi Arabia is one of 14 Arab nations to have signed up to take part in the Arab Free Trade Zone which is due to be introduced by 2007. The exchange rate of the Saudi Riyal has been pegged to the US dollar since 1986.

Regulations

The Kingdom of Saudi Arabia's basic telephony market is overseen by the former telephone operator the Ministry of Post, Telegraph and Telephone (MoPTT), which was spun off from the Ministry of Transport in 1976.

In May 1998 the Saudi government announced that the MoPTT had handed over its telephone networks to the newly formed Saudi Telecom Company (STC), which was set up with an initial capital of USD2.67 billion. The government intends eventually to privatise up to 80% of the new company, although no firm plans for this had been announced by February 2000. As part of this privatisation process the government proposes to create an independent telecoms commission which will assume the regulatory and licensing responsibilities of the MoPTT, leaving the ministry to produce legislation.

Basic telephony market overview

The state-owned Saudi Telecom Company (STC) has a monopoly of Saudi Arabia's facilities-based voice telephony market. At the end of September 1999 its infrastructure connected 2.55 million residential and business subscribers, up from 2.35 million nine months earlier. In March 1999 STC announced plans to increase its fixed line teledensity from 12 lines per 100 inhabitants to around 25 to 30 lines by installing a further four million lines by 2005. Away from the major cities, much of STC's infrastructure is based on microwave technology.

In November 1998 STC invited bids for its eighth telephone expansion project (TEP8), a USD6 billion plan to install an additional two million lines, establish new exchanges, replace parts of the existing copper network with fibre-optic cable and introduce microwave links to areas with no fixed infrastructure. After a series of delays, five companies entered bids to supply equipment for the project by the February 1999 deadline - Lucent, Ericsson, Siemens, Nortel and Alcatel. By February 2000 STC still had not chosen the winning bidder and a decision is not expected until mid-2000; the operator is

expected to split the work between two or three suppliers rather than give it all to a single company. The delay has been blamed on the weakness of oil prices, which has affected government cash flow.

In November 1999 STC announced the completion of TEP6, 18 months ahead of schedule. The plan, which called for the installation of 1.5 million digital fixed lines and capacity for 200,000 GSM mobile connections, was not due to be completed until mid-2001. The USD4 billion contract for TEP6 was originally awarded to AT&T Network Systems (now Lucent Technologies) in May 1994. As part of the project, 1,500 isolated villages were connected to STC's network. In a separate deal worth around USD111 million, Lucent was contracted in mid-1998 to upgrade the PTO's switch systems, covering approximately 900,000 lines. Towards the end of 1999 STC awarded a USD12 million contract to SR Telecom of Canada for the installation of TDMA wireless in the local loop (WiLL) equipment in central and southwestern areas of the kingdom.

As well as residential telephony, STC offers leased lines and data services and provides international voice and data communications thanks to its membership of the Arabsat, Intelsat and Inmarsat international satellite organisations (*see Other markets section*). At March 1999 STC had around 6,000 data lines in service.

Through the MoPTT, the Saudi government has stakes in several international cable systems. It was one of the major investors in the SEA-ME-WE 2 undersea cable which links Europe, the Middle East and South East Asia, contributing approximately 15% of the total cost of the project. In addition, in September 1999 STC signed an agreement to purchase capacity on the Fibre-optic Link Around the Globe (FLAG) system, a 28,000km cable which stretches from the UK to Japan. FLAG's landing station at Jeddah entered operation in July 1999. Saudi Arabia is connected to the neighbouring island of Bahrain via a 70km fibre-optic cable which runs alongside the King Fahd causeway, while a point-to-point microwave link offers a terrestrial connection to Sudan.

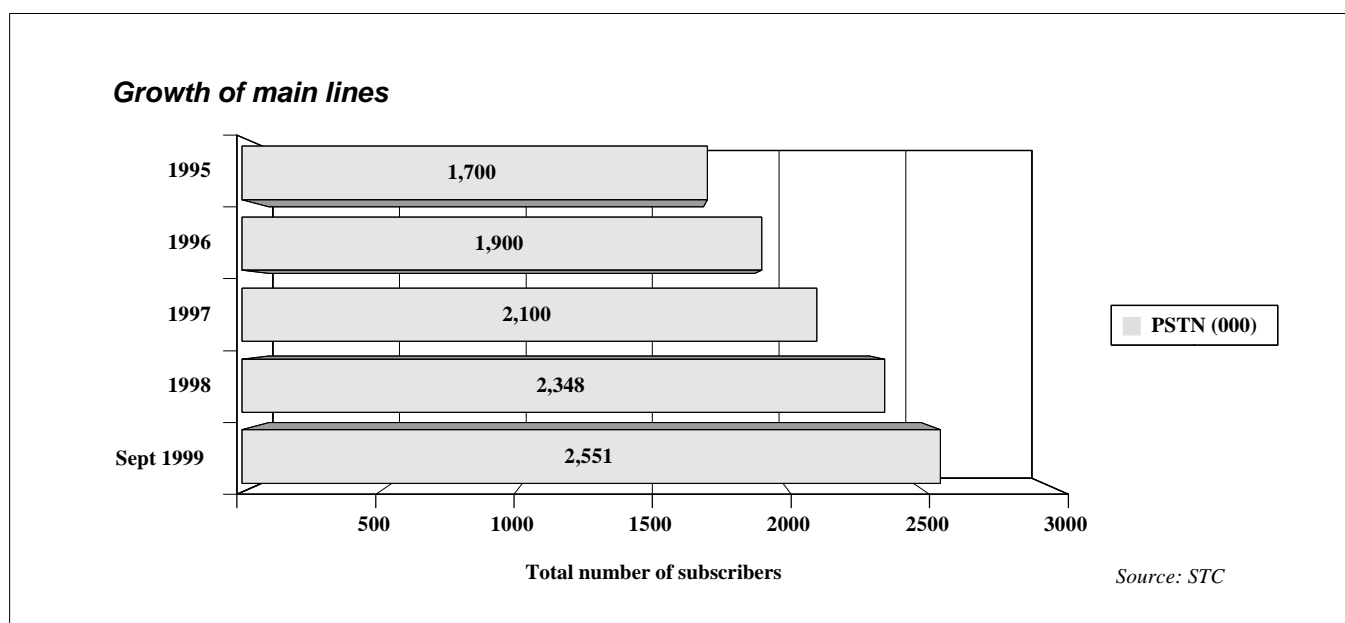
Facilities-based licensees

Operator and ownership	Date first licensed	Operating licence	Local telephone subscribers
STC (state 100%)	1998	Local, long-distance, international	2.55 million
Total number of telephone subscribers (Sept 1999):			2,551,372
Teledensity (Sept 1999):			12%

Source: operator

In June 1999 STC awarded a contract for the installation of 100,000 smart-card payphone to the local company Silkilasilki Telecommunications, formed in 1999 from the merger of some of Prince Al-Waleed bin Talal's telecoms operations with Abdulaziz Al-Hagabani's National Group for Communications. Silkilasilki Telecommunications will receive 16% of all revenues from the payphones for seven years after their installation, at which time STC will regain full ownership.

On 1 July 1999 the government took tentative steps towards competition in the basic telephony market when it awarded four licences to Saudi companies for the provision of public telephony services using pre-paid cards. One of the companies, National Advanced Systems Company (Nasco), plans to introduce cards costing between SAR25 and SAR200.



Regulations

The Saudi market for cellular telephony is regulated by the Ministry of Post, Telegraph and Telephone (MoPTT). There are two licensed operators: state-owned Saudi Telecom Company (STC) which operates a nationwide service, and the private Electronic Applications Establishment (EAE) which offers coverage only in Riyadh. It is thought that the government will encourage competition in the cellular sector by awarding a new national GSM licence before 2002.

Mobile market overview

The Kingdom of Saudi Arabia has one of the Middle East's largest mobile markets in terms of subscriber numbers, although the high cost of subscriptions restricts their accessibility. By the end of 1998 the country had approximately 530,000 mobile users and a penetration rate of 2.9%, rising to 3.6% nine months later by the addition of a further 260,000 subscribers. The country's largest operator, STC, estimated in late 1998 that it would have signed one million mobile subscribers by 2005, but it seems that it will reach this target sooner rather than later.

The first commercial cellular service was introduced in 1977, although this was limited to just 1,200 users in Riyadh, Jeddah and Taif. In August 1981 the MoPTT launched an analogue network covering the main cities and highways using NMT-450 technology with a

capacity for around 16,000 subscribers. By September 1999 the popularity of digital services had seen subscriptions to this network fall to virtually zero.

Digital mobile services were first introduced to Saudi Arabia in January 1995 and by the end of 1998 accounted for around 97% of all subscribers. By far the country's largest digital operator is STC. Its GSM-900 network was launched in January 1996 and by the end of September 1999 had 789,836 subscribers, up from around 514,000 nine months earlier. By early 2000 STC had signed roaming agreements with operators in Bahrain, Kuwait, Qatar, the UAE and the UK.

In September 1999 STC announced that it was inviting bids from seven international equipment suppliers for the expansion of its GSM infrastructure. The companies - Lucent, Motorola, Alcatel, Siemens, Ericsson, Nokia and Nortel - were asked to quote for the installation of infrastructure to handle an additional one million mobile subscribers. Although the bidding closed at the end of October, by February 2000 a result had still to be announced. An earlier USD699 million expansion contract to provide capacity for 575,000 GSM connections over 15 months was won by Lucent in July 1998; the same company installed the original 500,000-capacity network as part of Saudi Arabia's sixth telephone expansion project (TEP6) in 1994.

STC's only rival for GSM subscribers is EAE Al-Jawwal, which launched the country's first digital

Main operators

Mobile

Operators	Network	Launch date	Coverage	Subscribers (000s)	
				end 1998	Sept 1999
STC (state 100%)	NMT-450	1981	major cities	16	0
	GSM-900	1996	major cities	514	790
EAE Al-Jawwal (EAE 100%)	GSM-900	1995	Riyadh	na	na

Total number of mobile subscribers (September 1999): 789,836*

*STC only

Paging

STC (state 100%)	POCSAG/ERMES	1990	14 cities	700	na
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Total number of paging subscribers (end 1998): 700,000

Source: operators

cellular service in Riyadh in January 1995. Despite its head start, EAE has failed to provide any serious competition to STC. The operator is wholly owned by the Electronic Applications Establishment, a Riyadh-based company founded in 1988. By the end of June 1999 EAE had signed roaming agreements with 26 international partners in the Middle East, Asia and Europe, although only six of these were operational.

In the realm of mobile business communications, in August 1999 the GEC-owned equipment supplier Marconi was chosen by the Saudi Arabian Oil Company (Aramco) to design and install an 800Mhz digital mobile radio network using the TETRA standard. The contract covered the installation of base stations, switches and network management infrastructure.

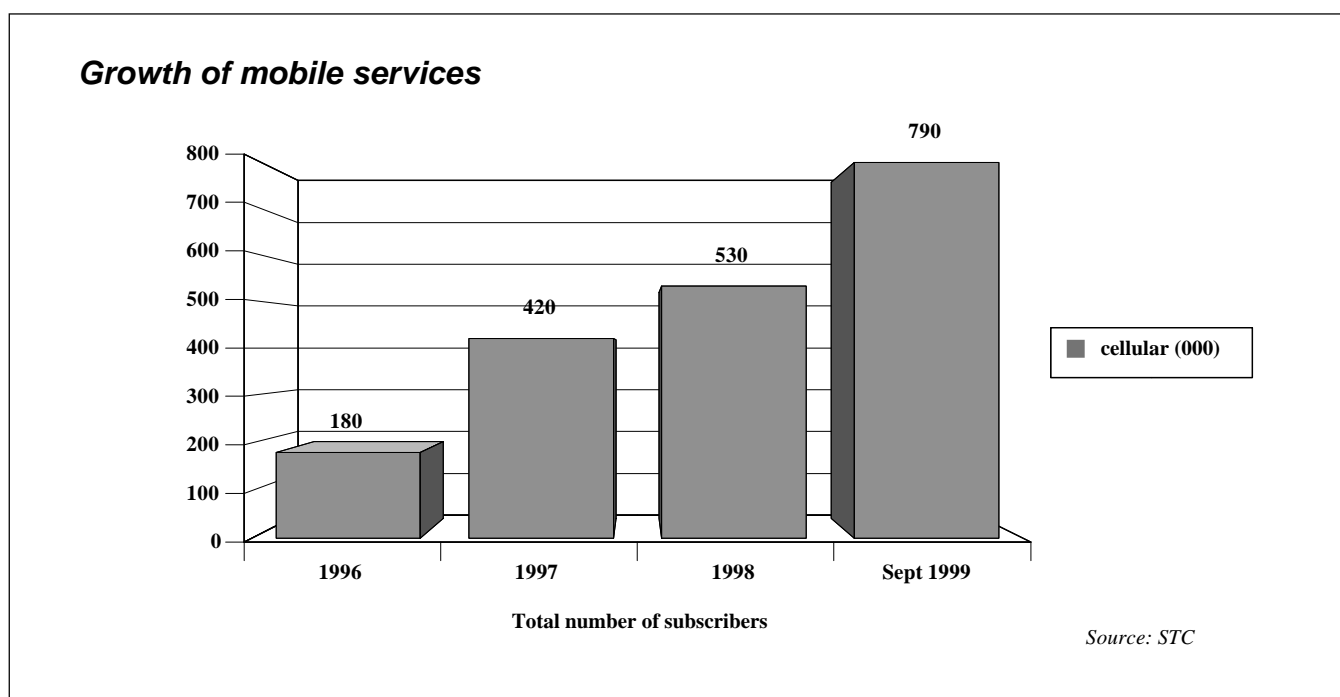
STC is an authorised distributor of the Iridium global mobile service which was launched worldwide in November 1998 and is also a partner in the ICO Global consortium. Iridium's Middle East subsidiary was set up by the Saudi companies Binladin and Mawarid Overseas in 1997. In addition, through its stake in Arabsat (*see company profiles section*), STC holds a share in Thuraya Satellite Telecommunications Company, which is due to launch its own satellite mobile service in 2000. Thuraya's services will be distributed in the Kingdom by the Riyadh-based National Group for Communications and Computers (NGC).

In September 1997 the global mobile satellite operator Globalstar announced that following its launch, originally scheduled for late 1998, its services in Saudi Arabia

would be provided by Riyadh-based Trans Arab Telecom Company (TATCOM), a subsidiary of Dallah Telecom and the Saudi Trading and Construction Co. However, due to operational problems Globalstar was forced to delay its launch. When services become available in the Middle East in the first half of 2000 they will be offered under the name Saudi Globalstar. In July 1999 the company awarded a USD4.2 million contract to Logica of the UK to supply customer care and billing systems, as well as a pre-paid card platform. Meanwhile Saudi company Al-Murjan was chosen in mid-1998 to distribute Globalstar services in Kuwait, the UAE, Qatar, Oman, Yemen, Jordan, Syria and Bahrain.

STC has the honour of operating the world's largest paging network based on the ERMES standard, with approximately 512,000 subscribers by the end of 1998 and an estimated 600,000 by December 1999. The network, which was originally installed by Tecnomen of Finland in 1994, covers 14 Saudi cities. In November 1999 STC awarded Tecnomen a USD2 million contract to expand and upgrade the network. The PTO also operates a POCSAG-based service which was built by Ericsson in 1990 and had attracted 188,000 customers by December 1998.

In October 1999 STC signed a deal with Motorola for the provision of a further 250,000 pager connections using the FLEX protocol, increasing STC's total paging capacity to more than one million subscribers. Existing customers will be able to migrate their subscription from the ERMES network to the new FLEX network.



Regulations

The Saudi cable and satellite broadcasting sectors and the market for satellite communications services are regulated by the Ministry of Post, Telegraph and Telephone (MoPTT).

Licences to operate as an Internet Service Provider (ISP) are awarded by the King Abdulaziz City for Science and Technology (KACST), a Riyadh-based educational establishment which is a licensed ISP in its own right. Due to the country's strict Muslim laws, subscribers are able to visit only a limited number of approved websites, all of which have had their content sanctioned by KACST.

Cable market overview

Due to religious concerns over the content of some DTH satellite television services, the Saudi government has encouraged the development of cable TV in the Kingdom. The major Saudi cable operator is SARA Vision, a subsidiary of the Riyadh-based media group ARA Group International. It was due to launch a 20-channel service in Riyadh, Jeddah and Dharan in September 1996 with a coverage of approximately 300,000 homes. However, it was not until late 1998 that the service actually got off the ground, with US equipment supplier General Instrument rolling out the infrastructure. SARA Vision's service is delivered using microwave multipoint distribution service (MMDS) technology, which reduces the cost of rolling out a network by using wireless signals to connect subscriber premises.

Satellite market overview

The Saudi government is the majority owner of the Middle East's international satellite organisation Arabsat, which offers a range of voice, data and video communications as well as TV and radio broadcasting services. The footprints of its three satellites extend beyond the Middle East to cover Europe, North and East Africa and Western Asia. Arabsat is a 10% shareholder in the UAE-based global mobile satellite system Thuraya which is due to launch during 2000. (*For more information on Arabsat please turn to the company profile.*)

Through STC the government is also a shareholder in the international satellite ventures Intelsat (0.89%) and Inmarsat. STC utilises capacity on these platforms to provide voice and data communications services to Saudi businesses.

Despite the government's attempts to limit the influence of Western media by introducing a ban on satellite TV dishes, an estimated 200,000 Saudi homes were subscribing to one of the region's DTH broadcasters by the end of 1999. One of the largest of these companies is Saudi-based Arab Radio and Television (ART), a multi-channel service which was launched in October 1993 using the Arabsat-1 platform. It has since transferred its broadcasts to the Arabsat 2A second-generation platform launched in September 1996. ART's major investors include Saudi prince Al-Waleed bin Talal and Sheikh Saleh Kamel. The broadcaster offers a ten-channel basic service and an 18-channel premium package, both of which include ART's five in-house channels: Variety, Movies, Children, Sport and Music. ART is available to Arab viewers worldwide via platforms in Europe, Africa, Asia, the US and Latin America.

Several of ART's competitors have in the past signed agreements with Western broadcasters in order to boost their programme content. However, one such deal - between Saudi company Orbit Communications and the BBC - broke down due to Orbit's attempts to censor BBC programming. Broadcasting from Italy to homes in the Middle East and North Africa, Orbit's digital DTH service served approximately 170,000 subscribers by mid-1998. Its offerings include a package of seven channels from Star Select, a subsidiary of Rupert Murdoch's News Corporation. Orbit is owned by the Riyadh-based Mawarid Group. Middle East Broadcasting Centre (MBC), which like SARA Vision is owned by ARA Group International, signed a programming deal similar to that of Orbit and the BBC with the US company Voice of America. Both ARA and MBC are owned by Sheikh Walid Ali Ibrahim, a brother-in-law of Saudi Arabia's King Fahd.

Another pan-regional DTH platform is Showtime, a Dubai-based operator which offers 14 TV and ten audio channels to approximately 200,000 homes across the Middle East and North Africa. The broadcaster launched in 1996 and is owned by South Africa's Multichoice Middle East and Gulf DTH, a joint venture between Kuwait Investment Project Company and Viacom of the US.

Multimedia market overview

Internet services were launched in Saudi Arabia in January 1999; before that date Saudis wishing to connect to the Internet were forced to subscribe to ISPs in the US or other Middle Eastern countries and pay international telephone rates. At the end of 1998 around 2,500 Saudis were subscribing to the Internet access service of Batelco, the national PTO in neighbouring

Bahrain. The Saudi government has placed responsibility for the development of the Internet in Saudi Arabia in the hands of KACST.

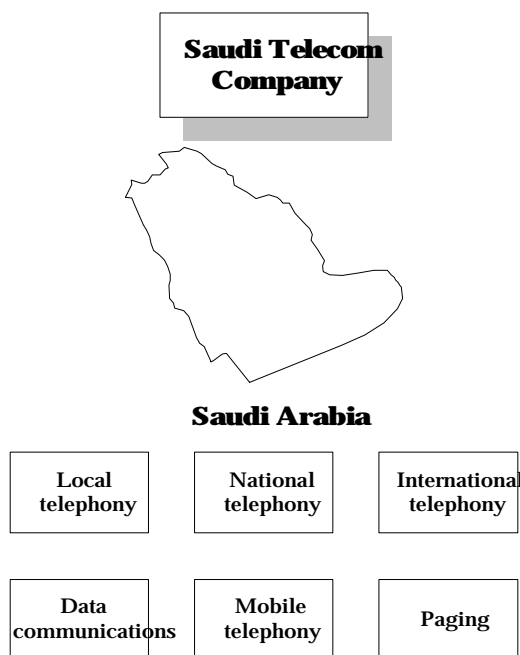
Of the 150 or so companies which showed an interest in acquiring an Internet licence, 42 were approved by KACST in December 1998. Several had already withdrawn their applications when KACST revealed that the maximum hourly rate which ISPs could charge would be SAR4.50; companies which dropped out of the running complained that the high start-up costs involved would make a commercial service unviable.

Nevertheless, on 1 January 1999 Saudi customers were able to subscribe to the first of the country's domestic Internet services. All 42 companies were given six months in which to launch a commercial service; by that date 26 operators had done so and a further five had had the deadline extended. The remaining eleven companies had their licences revoked for failing to make sufficient progress towards a launch. The 2,200 Internet ports assigned to these operators were redistributed among the operational ISPs. Even after the eleven disqualifications, it is expected that high start-up costs and the limited size of the market will force some of the smaller operators to consolidate their assets.

By the end of 1999 the Kingdom had approximately 150,000 Internet subscribers. The country's largest ISP is KACST. Other operators include PrimeNet, Sahara Network and the Saudi Al-Jeraisy Group. PrimeNet is a division of the private Saudi company Silkilasilki Co and offers Internet access through dial-up or leased lines, E-mail accounts, domain registration and web hosting. Its residential charges range from SAR150 a month to SAR275. Sahara Network launched a similar portfolio of services in February 1999 and claimed to have more than 4,000 subscribers by the end of the year. The Saudi Al-Jeraisy Group has formed a joint venture with Bahrain PTO Batelco to provide Internet services in the Kingdom.

In July 1999 STC awarded a contract to Lucent subsidiary Ascend International for the second phase of the expansion of the country's Internet service. Ascend was charged with the installation of 5,000 Internet ports, doubling the country's existing capacity by the end of September. At that date Internet access was available to the majority of the population. In October 1999 Saudi Arabian Internet users staged a day of protest at the slow development of Internet services in the country.

Saudi Telecommunications Company



Operational overview

Saudi Telecommunications Company (STC) was created out of the Ministry of Post, Telegraph and Telephone (MoPTT) in May 1998. This was the first step towards the eventual privatisation of the operator and, though several foreign companies have expressed their interest in acquiring a stake in STC, by February 2000 the government had still to announce any firm timetable for the process. STC was set up with an initial capital of USD2.67 billion.

Meanwhile, STC retains its monopoly over Saudi Arabia's basic telephony market and is also the country's largest cellular operator. By the end of September 1999 it had 2.55 million fixed and 789,836 mobile subscribers, up from 2.35 million and 530,000 respectively at the start of the year.

Ownership

STC is wholly owned by the Saudi government.

Addresses and contacts

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Khalid Balkheyour, Director - International Relations

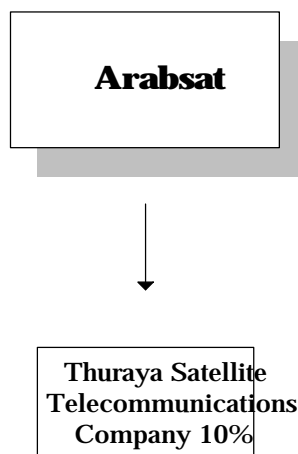
Sami Mobarah, International Relations

Saad Al-Mazrou, General Manager - Commercial Services

Infrastructure

	12/1996	+/- (%)	12/1997	+/- (%)	12/1998
PSTN lines in service	1,900,000	11%	2,100,000	12%	2,348,000
Cellular subscribers	180,000	67%	300,000	77%	530,000
Cellular subscribers - analogue	na	-	na	-	16,000
Cellular subscribers - digital	na	-	na	-	514,000

Arabsat



Operational overview

The Arab Satellite Communications Organisation (Arabsat) was established in April 1976 by the member states of the Arab League to provide telecommunication and broadcasting services to nations in the Middle East and North Africa. In 1990 the organisation voted to commence operations on a commercial basis rather than purely serving the needs of its shareholders. Arabsat is managed by a General Assembly, made up of the communication ministers from participating states.

The organisation's first two satellites, Arabsat 1A and 1B, were constructed by Aerospatiale of France and launched in 1985; a third platform, Arabsat 1C, was added seven years later. Two second-generation satellites (2A and 2B) were launched in 1996 to replace Arabsat 1A and 1B, while 1C was sold to the Indian Space Research Organization (ISRO) in November 1997. In February 1999 Arabsat 3A was launched, with a footprint that extended beyond the Middle East and North Africa to cover Western and Eastern Europe. The system has two control facilities, one at Dirab just outside Riyadh, and the other near Tunis. In addition, each member country has at least one earth station, except Libya which shares one with Tunisia.

Arabsat's portfolio of services includes voice and data communications, TV and radio broadcasting, VSAT and satellite news gathering. It also leases capacity to third parties.

Arabsat is a 10% shareholder in the Thuraya Satellite Telecommunications Company, a regional mobile satellite system based in the United Arab Emirates which is due to launch services in 2000. In December 1998, as part of the privatisation process of Qatari operator Q-tel, Arabsat purchased an unspecified number of shares in Q-tel, which is itself an Arabsat shareholder.

Financial highlights

USD thousand	12/1996	+/- (%)	12/1997	+/- (%)	12/1998
Revenue	65,616	78%	117,109	13%	132,616
Net income	32,258	69%	54,612	63%	88,783

Indicators

	12/1996	+/- (%)	12/1997	+/- (%)	12/1998
Turnover (USDm)	66	77%	117	14%	133
Profit margin	49.16%	-	46.63%	-	66.95%

Subsidiaries

Stake	Company	Operations
10.00%	Thuraya Satellite Telecommunications Company	United Arab Emirates mobile satellite systems provider.

Ownership

The Kingdom of Saudi Arabia	36.66%
The State of Kuwait	14.59%
The Arab Jamahiriya of Libya	11.28%
The State of Qatar	9.81%
The United Arab Emirates	4.66%
The Hashemite Kingdom of Jordan	4.05%
The Republic of Lebanon	3.83%
The State of Bahrain	2.45%
The Arab Republic of Syria	2.08%
The Republic of Iraq	1.90%
The Republic of Algeria	1.72%
The Republic of Yemen	1.65%
The Arab Republic of Egypt	1.59%
The Sultanate of Oman	1.23%
The Republic of Tunisia	0.74%
The Kingdom of Morocco	0.61%
The Republic of Sudan	0.27%
The Islamic Republic of Mauritania	0.27%
The State of Palestine	0.25%
The Democratic Republic of Somalia	0.24%
The Republic of Djibouti	0.12%

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