

# Annual Report 2008

بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ



Custodian of the Two Holy Mosques

**King Abdullah Bin Abdulaziz Al Saud**



His Royal Highness

**Crown Prince Sultan Bin Abdulaziz Al Saud**

The Deputy Premier & The Minister of Defence & Aviation  
& Inspector General



A model of the CITC's new building in Riyadh which is expected to be completed in 2012

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The CITC's headquarter building on King Fahad Road in Riyadh



Chairman's Statement

Governor's Statement

CITC Board

Vision and Mission







## Chairman's Statement



On behalf of the Communications and Information Technology Commission (“CITC”) Board, it is my pleasure to introduce the 2008 Annual Report of CITC, which highlights the major activities and accomplishments of the Commission during the year.

The Government continues to implement its telecommunications sector liberalization program by opening the market to further competition in line with its strategic national economic reforms. At the same time, the Government is working to promote the availability and usage of information technology (IT) services and applications, and to expedite the transition to an information society and a digital economy.

In order to achieve the economic and societal benefits that information and communication technology (ICT) can provide, the Government has implemented a balanced multi-stage plan to restructure the ICT sector. This included issuance of the Telecom Act, and establishment of CITC in 2001 as the telecom regulator and IT promoter with financial and administrative independence.

CITC has taken steps towards liberalizing the ICT market as well as promoting network rollouts and service provisioning while working to protect consumer interests. Competition was introduced in the mobile market when a second service provider launched its services in 2005 and a third in 2008. In order to introduce competition and stimulate the broadband market, two data communications licenses were also awarded in 2005. The fixed telecommunications market is being further liberalized with the selection of three consortia for the award of new licenses, thus opening the fixed telephony market to competition for the first time in Saudi Arabia as well as widening competition in the provision of broadband data services. In addition, steps were taken to boost Internet usage and promote IT adoption.

CITC continues to apply a balanced regulatory approach to stimulate competition while safeguarding consumer rights and other stakeholders' interests. CITC's efforts have led to increased availability of services with improved quality and lower prices. This in turn has contributed to growth of the sector in terms of the number of subscribers, the number of licensed service providers and the magnitude of sector revenues.

In conclusion, I would like to pay tribute to the strong support provided by the Government of the Custodian of the Two Holy Mosques to the sector and to CITC. I also wish to thank CITC Board, H.E. the Governor and CITC employees for their dedication and efforts. I am confident that they will continue to excel and contribute to meet the challenges of 2009 and beyond.

**Eng. Mohammed Jamil A. Mulla**  
**Chairman of the Board**



## Governor's Statement



CITC is playing a leading role in the development of the ICT sector in the Kingdom of Saudi Arabia. Through liberalization of the telecommunications market and by promoting IT usage, CITC is contributing to the realization of the national strategic goals of developing the economy, creating jobs, improving standards of living and transitioning to a knowledge society. To foster development of the ICT sector, the Commission has worked towards creating a positive transparent and fair regulatory environment. It has been working to increase the level of competition in the provision of telecommunications services, leading to more consumer choice, better quality of service and reduced prices.

This report reviews the main activities and achievements of CITC in 2008 in implementing its strategic plan, which is aimed at achieving its vision of “universally available, high quality and affordable communications and information technology services”.

Since its establishment in 2001, the Commission has been working to implement Government policies of ICT sector liberalization, which in turn is helping to promote economic development, social welfare and to raise the standard of living in the Kingdom.

The focus of CITC's efforts in the year 2008 was on pursuing liberalization of the sector and developing ICT services. Among the most notable achievements of the year was the launch of the third mobile service provider's services, thus heralding the transformation towards a fully competitive mobile market. The year also witnessed the approval by the Council of Ministers of the award of licenses for the provision of fixed telecommunications services to three selected service providers. Furthermore, the “National Frequency Plan” was approved and its implementation started as per the approved timetable. In addition, CITC issued licenses for the provision of a number of other services and pursued its regulatory activities aimed at ensuring fair and effective competition. These activities included fostering development of Internet services; promoting IT adoption and use; managing the scarce frequency spectrum and numbering resources; establishing technical specifications for telecommunications equipment; addressing user complaints; resolving operator disputes; dealing with violations of the Act; preparing guidelines; developing the regulatory frameworks; and conducting studies aimed at enhancing the development of the ICT sector.

The Commission maintains its firm commitment to its established principles of fairness, transparency, consultation and a balanced approach in order to safeguard the public interest and the interests of all stakeholders, including consumers, service providers and investors. As a testimony to its fairness and transparency, CITC was awarded the first “Saafah Role Model Award” for the Year 2008. The “Saafah” is awarded in recognition of excellence in transparency and integrity among public and private entities.

In conclusion, I would like to pay tribute to the continued support of the Government of the Custodian of the Two Holy Mosques. I also wish to thank His Excellency the Chairman of the Board, the Board members, all CITC staff and to all who contributed to the success of the Commission by sending their views and suggestions to CITC and supporting it in the pursuit of its goals.

**Dr. Abdulrahman A. Al-Jafary**  
**Governor**

## CITC Board



H.E. Eng. Mohammed Jamil Mulla  
Minister of Communications and  
Information Technology  
Chairman



H.E. Dr. Abdulrahman A. Al-Jafary  
Governor of CITC  
Deputy Chairman



Dr. Abdullah A. Al-Rasheed  
King Abdulaziz City for Science and  
Technology



Mr. Ali S. Al-Hedaithi  
Ministry of Finance



Mr. Ahmed H. Bedaiwi  
Ministry of Trade and Industry



Dr. Assad S. Abdo  
Private Sector



Dr. Jameel Abdullah Al Jishi  
Private Sector



Mr. Saleh Eid Al Hussein  
Private Sector

## Our Vision:

Universally available, high quality, affordable communications and information technology services.

## Our Mission:

- Provide a fair, clear and transparent regulatory environment to promote competition, safeguard public interest and stakeholder rights.
- Enable universal availability of advanced ICT services and optimize utilization of scarce resources.
- Increase ICT awareness and usage to enhance national efficiency and productivity.
- Build a professional and motivated CITC team.



His Royal Highness Prince Salman Bin Abdulaziz honoring his Excellency the Governor of CITC with the Saafah Role Model Award in transparency and integrity for the year 2008

## Saafah Role Model Award

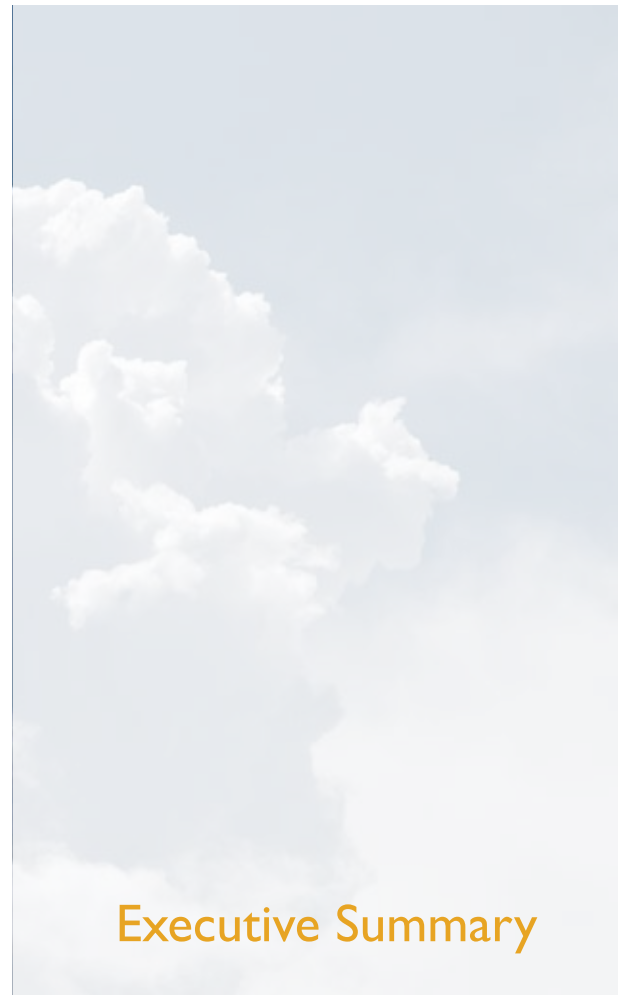
CITC won the “Saafah Role Model Award” for the year 2008, in recognition of excellence in transparency and integrity.

The “Saafah” award honors those organizations that promote ethical behaviour, social responsibility, transparency, integrity and accountability in everyday business practices in Saudi Arabia.

CITC is the first organization to win this prestigious award. The Saafah Award Committee explained that CITC was selected as the first winner among public and private institutions in recognition of its demonstrated adherence to best practices of transparency, integrity, fairness and accountability, with a specific mention of its licensing programs, equitable treatment of service providers and balanced approach to fair tariff regulation.







## Executive Summary



## I Executive Summary

This report summarizes the main activities and accomplishments of CITC during 2008. The report states CITC's vision and mission together with the regulatory framework and CITC's roles and responsibilities. It reviews the key indicators of the ICT market evolution since creation of CITC. It also highlights the "Saafah Role Model" for the Year 2008 awarded to CITC, in recognition for excellence in transparency and integrity. The report then describes the major activities and achievements during the reporting period (Section 4), including:

- Issuance of a third mobile services license and launching of the licensee's services commercially
- Licensing and promotion of competition
- National frequency plan
- Reference interconnection offer (RIO)
- Reference offer for data access (RODA)
- Long run incremental costing (LRIC)
- Terms and conditions of service
- Tariff regulation
- Market definitions and dominance
- Emergency and disaster recovery plans (DRP)
- Universal service and universal access (US/UA)
- National numbering plan (NNP)
- Number portability (NP)

- Quality of service (QoS) indicators
- Guidelines for right of way (RoW) and site sharing
- Electromagnetic radiation
- Regulatory and technical guidelines
- Internet service and domain name registration
- National Internet exchange
- National center for information security (CERT-SA)
- Anti-SPAM program
- Information security guidelines and procedures
- Violations and dispute resolutions
- Consumer complaints
- Media activities
- ICT services for pilgrims during the Hajj and Ramadan

The report also highlights some of the studies undertaken by the Commission during 2008 (Section 5) and presents CITC's work program for 2009 (Section 6). Finally, the report contains a number of annexes summarizing the key Board decisions, CITC decisions, public consultations, other activities and achievements, licenses issued, CITC web sites, excerpts from CITC staff Code of Conduct and financial accounts for the year.



His Excellency, the Minister of Communication and Information Technology, Engineer Mohammed Jamil Bin Ahmed Mulla inaugurating 2008 Gitex Exhibition



ICT Sector in the  
Kingdom of Saudi Arabia



## 2 ICT Sector in the Kingdom of Saudi Arabia

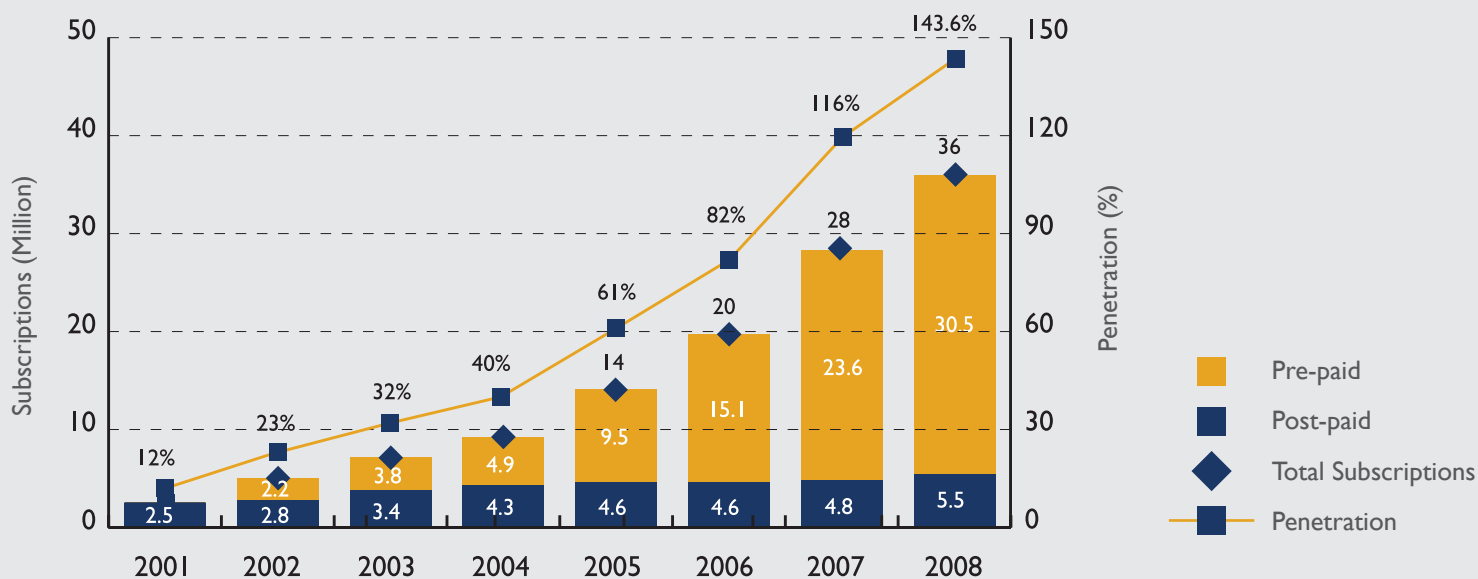
### 2.1 ICT Sector Evolution in Saudi Arabia

#### 2.1.1 Mobile Telecommunications Market:

Competition in the mobile telecommunications market, which started in 2005, intensified in 2008 with the launch of the services of the third mobile licensee (Zain - Saudi Arabia). The competition has resulted in major developments in terms of service offerings, quality of service, customer care, reduced prices and subscriber growth. The total number of mobile subscriptions has grown to around 36 million (144% penetration) by the end of 2008, up from 28.4 million in 2007 and only 2.5 million when CITC was established in 2001. The compound annual average growth rate (CAGR) for the last seven years amounted to around 46% annually. Figure I-A depicts the mobile subscription evolution from 2001 to 2008.

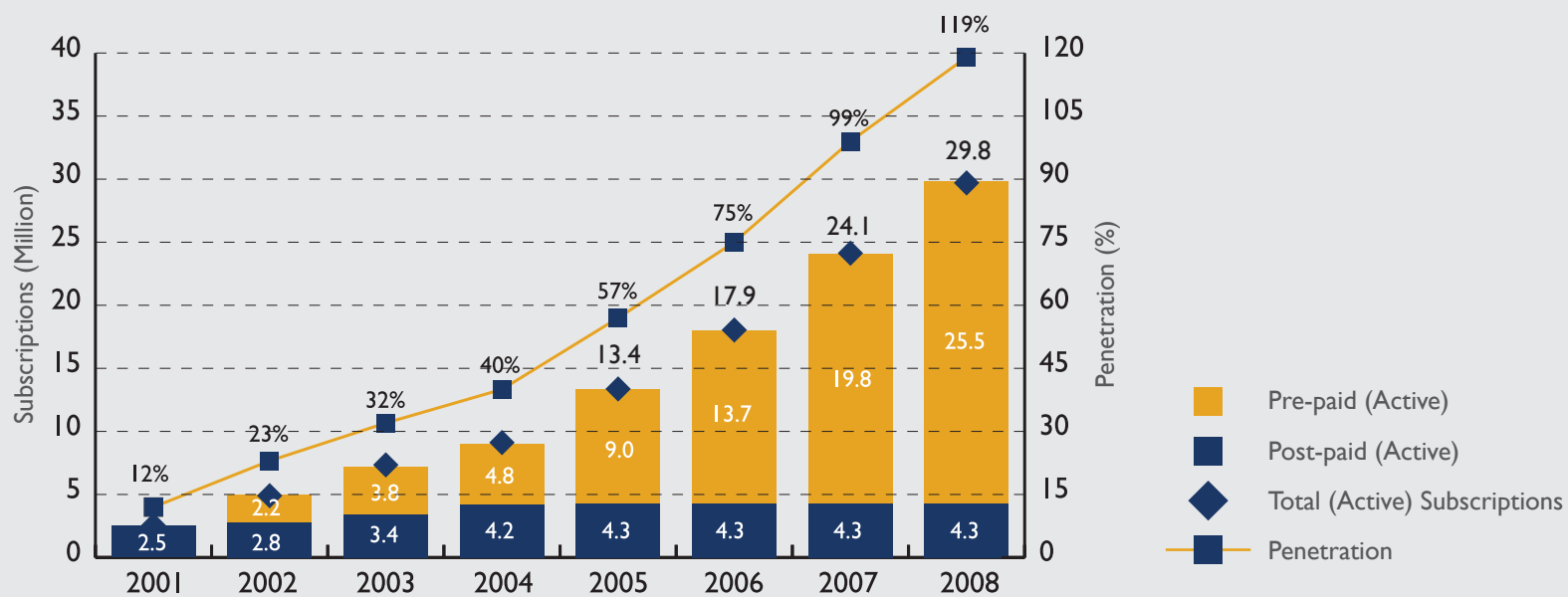
It should be pointed out that the subscription numbers shown in Figure I-A are based on raw data reported by the mobile service providers. Active subscription numbers, based on CITC's 90-day activity rule, are estimated to be around 18% less than the total raw subscription numbers. Figure I-B shows the growth of active subscriptions in the Saudi market. Active mobile subscriptions reached around 29.8 million by the end of 2008, translating to around 119% or 119 active subscriptions per 100 inhabitants. Prepaid subscriptions constitute the majority (85%) of all mobile subscriptions, in line with the trend in other similar markets around the world.

Figure I-A: Mobile Service Market Growth – Total Subscriptions (2001-2008)



Note: Based on numbers reported by mobile service providers (including temporary addition of about 2 million pilgrims and visitors).

Figure I-B: Mobile Service Market Growth in Saudi Arabia – Active Subscriptions (2001-2008)



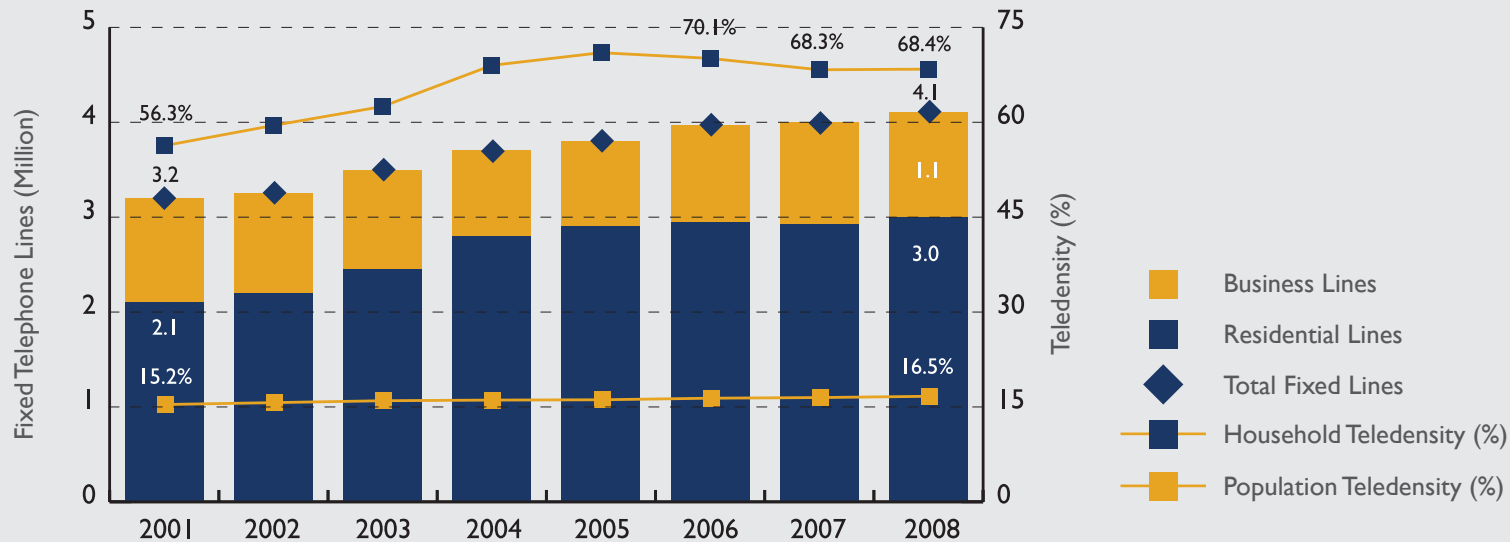
Note: CITC estimates are based on numbers reported by mobile service providers (including temporary addition of about 2 million pilgrims and visitors).

## 2.1.2 Fixed Telephony Market:

Figure 2 below shows the evolution of fixed telephone service in Saudi Arabia from 2001 to 2008. Fixed telephone lines reached 4.123 million at the end of 2008, of which around 3 million or 73% were residential lines. This represents a household teledensity of around 68.4% or 684 residential lines for every 1000 households. The population teledensity is around 16.5% or 165 telephone lines for every 1000 inhabitants. This compares favorably with the average teledensity in the Arab World (11%) and the developed countries (13.5%).

The slight decline in residential fixed telephone lines is attributable to reduced demand for fixed services due to the increased adoption of mobile services, as telecommunications is becoming more personal and focused on the individual (rather than a shared household service). This migration or “fixed-to-mobile substitution” is a global trend witnessed in many countries. Furthermore, the growth of digital subscriber line (DSL) subscriptions has reduced the need for more than one line in a household, as a DSL line negates the need for a separate line for Internet access.

Figure 2: Fixed Telephone Evolution in Saudi Arabia (2001-2008)



Note: CITC analysis is based on operators' numbers. Population teledensity is calculated by dividing total fixed telephone lines by the population, while household teledensity is calculated by dividing only residential lines by the number of households.



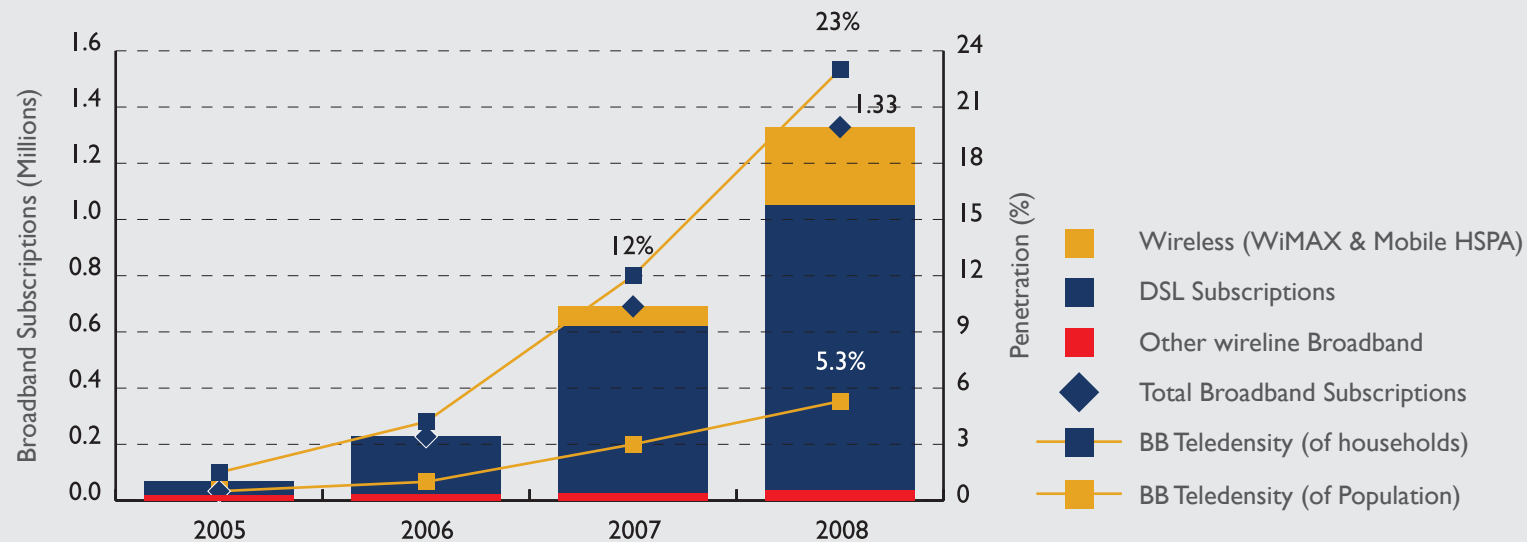
### 2.1.3 Broadband Services Market:

The number of broadband subscriptions has grown from 64,000 in 2005 to over 1.33 million at the end of 2008, as depicted in Figure 3. This represents a CAGR of around 175% and over 20-fold increase in the 3 year period. The broadband penetration rate stood at around 5.3% of population by the end of 2008 or 53 broadband connections for every 1000 inhabitants.

Broadband household penetration is a more relevant indicator as a single broadband connection in a house can provide high speed data access to all members of a household. By the end of 2008, household broadband penetration stood at around 23% or 23 broadband connections for every 100 households, assuming that three quarters of all broadband connections are residential. This is double the household penetration of the preceding year.

Despite the high growth rates over the last few years, however, there is still room for growth in broadband services. With the opening of the fixed telecommunications market to competition, the broadband market is expected to continue to grow at a fast pace, as the new fixed service providers roll out their broadband networks and competition picks up to meet the growing demand.

Figure 3: Broadband Market Evolution (2001-2008)

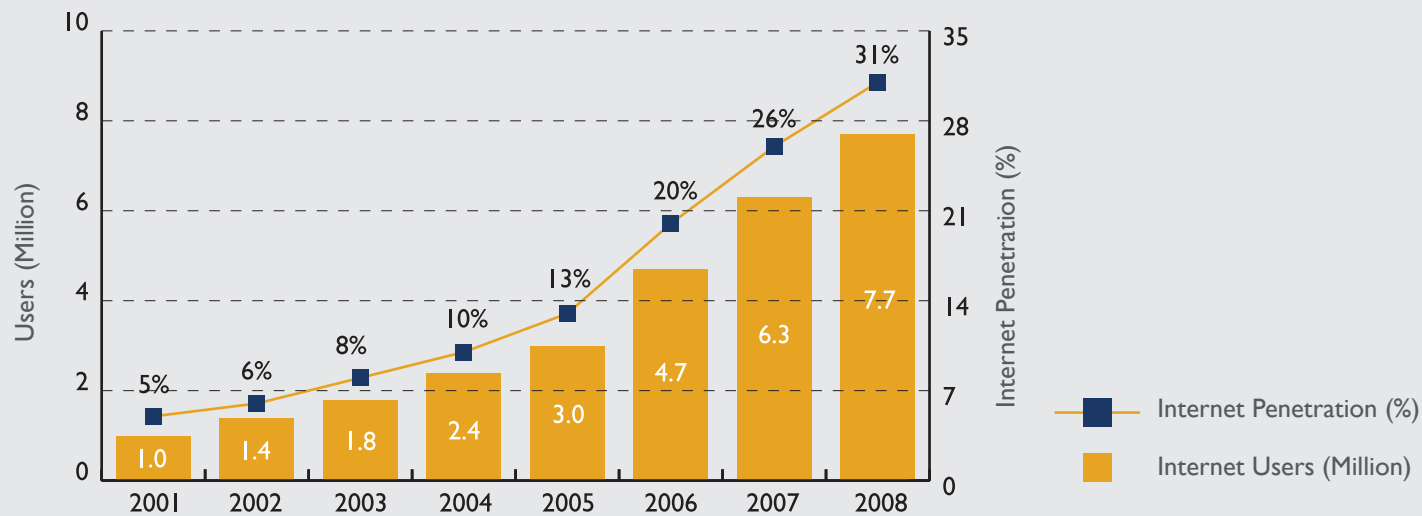


## 2.1.4 Internet Services Market:

The number of Internet users grew from around 1 million in 2001 to an estimated 7.7 million at the end of 2008, as shown in Figure 4. This corresponds to a CAGR of around 34%. Internet penetration increased to 31% of the population in 2008 or 31 Internet users for every 100 inhabitants. This penetration rate (31%) is higher than the world average (23%) and more than double the average of Arab countries (14%).

This rapid growth is attributed to increased public awareness; growth in availability of broadband services; decreasing cost of personal computers and Internet access; and enhanced usefulness of the Internet brought about through increased availability of local content, of Arabic language sites; of e-services such as online banking, e-commerce and e-government applications.

Figure 4: Internet Market Evolution (2001-2008)



Note: For the years 2001-2006, numbers of users are CITC estimates based on reported Internet connections (dial-up and broadband).

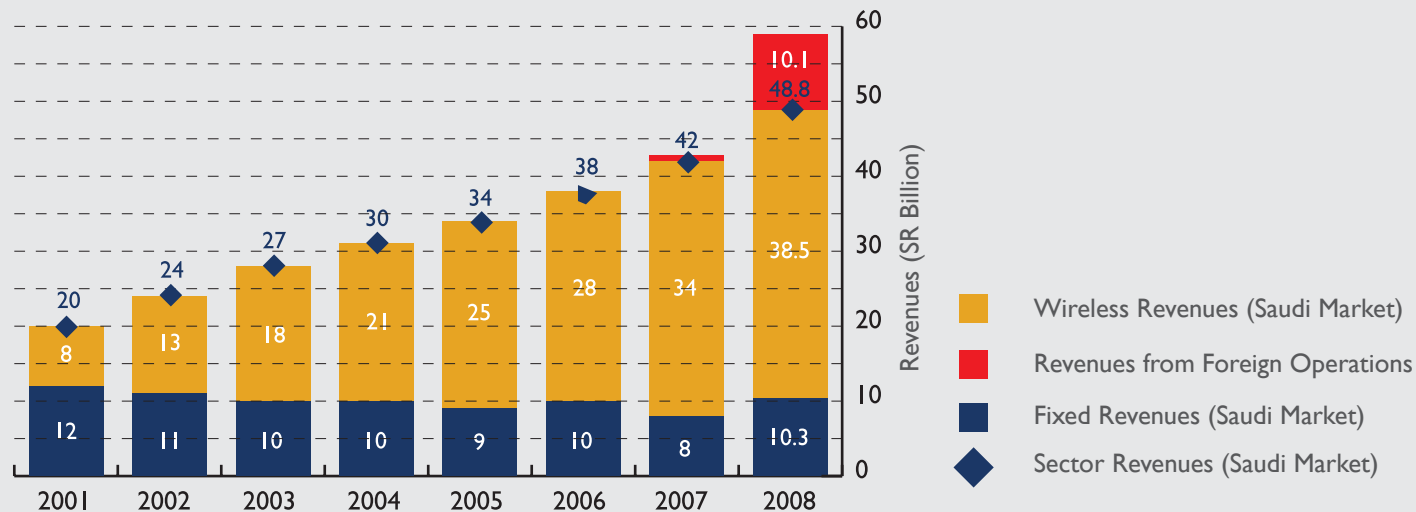
For the years 2007 and 2008, the connection-based estimates are adjusted based on the results of a major field survey of the Internet market commissioned by CITC.

## 2.1.5 Telecom Services Sector Revenues:

Domestic telecom services revenues have been steadily growing at a cumulative average rate of around 14% annually, increasing from around SR 20 billion (US\$ 5.3 billion) in 2001 to around SR 48.8 billion (US\$ 13 billion) in 2008. Mobile services revenues represent around 79% of all telecom sector revenues in the Saudi market, which is in line with trends in other countries. Figure 5 tracks the overall revenue growth, including both fixed and mobile services revenues, over the eight years (2001-2008).

In addition to revenue from the domestic market, investment by Saudi licensed telecom companies in foreign telecom markets including Malaysia, Indonesia, India, Turkey and South Africa, have led to rapid growth of revenue for the sector from foreign operations, from zero in 2006 to SR 455 million in 2007 and to more than SR 10 billion in 2008. However, domestic revenues still represent around 83% of the SR 58.9 billion (US\$ 15.7 billion) total sector revenue in 2008.

Figure 5: Telecom Sector Revenues (2001-2008)

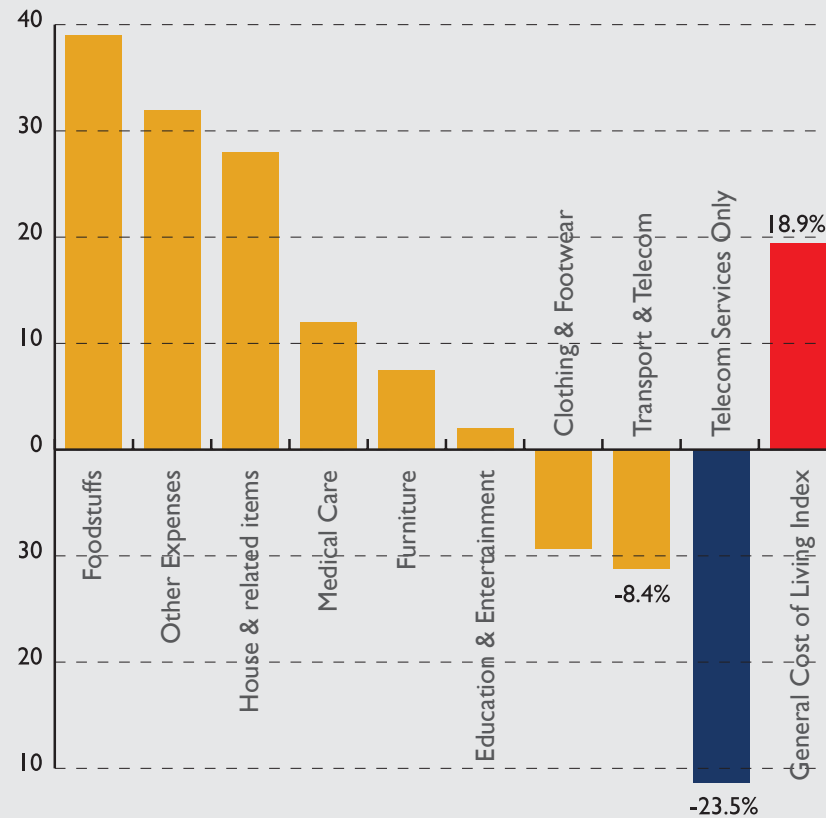


## 2.1.6 Telecom Services Prices and Inflation:

The liberalization of the telecom sector and the resulting competition in the market, has led to remarkable benefits for the economy at large and for the consumers in particular – in terms of increased service availability, better quality services, improved customer care, more consumer choices, and lower prices.

While the cost of living index continued to rise in the last few years due to increased prices of most of its components, the prices of telecom services progressively decreased. Figure 6 depicts the relative changes in the overall cost of living index (CLI) and of its major expenditure groups, during the period 2002 to 2008. The telecommunications services subgroup is also included in the Figure for ease of comparison. While the general CLI index increased by around 19% cumulatively over the last six years, with most of its expenditure groups rising, the transportation and telecom groups decreased by around 8.4%. Most notably, however, is that the telecom services subgroup went down during the same period by 23.5%.

Figure 6: Change in the Cost of Living Index (inflation) in Saudi Arabia over the period 2002-2008 (cumulative)



Source: CITC analysis is based on data published by the Central Department of Statistics & Information ([www.cdsi.gov.sa](http://www.cdsi.gov.sa))

## 2.2 Regulatory Framework

CITC is the telecommunications regulator and information technology promoter in the Kingdom of Saudi Arabia. The Telecom Act (enacted in June 2001) and its Bylaw (issued in July 2002) provide the basis for CITC's regulatory framework. CITC Ordinance (issued in June 2001 and amended in July 2003) defines CITC's mandate, functions, governance, and financing. The Rules of Procedures (issued in 2004) detail the steps service providers and CITC need to follow for timely disposition of issues addressed to CITC.

CITC applies a "technology neutral and service specific" licensing regime, which allows licensed service providers to offer specific services, under the terms and conditions of their licenses, utilizing technologies of their choice. CITC has been working to further liberalize the ICT market, increase competition in the mobile and the fixed services markets, encourage the rollout of competitive network infrastructures and the offering of new services, and enable universal availability of advanced ICT services.

During 2008, CITC continued to review and develop its regulatory framework. In so doing, CITC continued its established practice of conducting public consultations taking into account comments from stakeholders and interested parties and considering the public interest and protection of consumers. The following regulatory framework documents and technical guidelines were published in 2008 (the associated Decisions are listed in Appendices A and B):

- Promotional Offer
- Wireless Local Area Network (WLAN/WiFi) Usage
- Provisioning of Mobile Prepaid Services

- SMS Service Termination Mechanism
- SMS Usage to Solicit and Collect Charity Contributions
- Definition of Active Mobile Subscriber
- Amended Schedule of Fees for 4, 5, and 6 Digits Numbers
- Allocation and Use of Short Access Codes
- Use of Nomadic Numbers

CITC Statutes as well as the published regulatory framework documents are available on CITC's web site ([www.citc.gov.sa](http://www.citc.gov.sa)).

In the field of Information Technology, the "e-Transaction Act" and the "e-Crimes Act" were enacted by the Council of Ministers, and issued by Royal Decrees, in March 2007. Subsequently, CITC prepared the e-Transactions Bylaw which was issued by the Ministry of Communications and Information Technology in March 2008.

## 2.3 CITC Roles and Responsibilities

CITC roles and responsibilities are defined by its Ordinance and other relevant Government directives. The most important roles of CITC include the following:

- To implement the ICT sector policies, plans and programs.
- To issue the necessary licenses for ICT service provisioning.
- To liberalize and regulate the telecommunications market while attracting local and international investments in the ICT sector.
- To encourage reliance on market forces for the provision of telecom and IT services.
- To safeguard the public interest, protect consumer rights and ensure safety and security within the ICT environment.
- To ensure fair and equitable treatment of all stakeholders including the service providers, the investors, the government and the users.
- To establish the basis for telecommunications services tariff regulation.
- To establish conditions related to Universal Service and Universal Access.
- To manage the radio frequency spectrum resource, including development of the National Frequency Plan and to propose a spectrum usage fee structure.
- To establish and manage the National Numbering Plan.
- To promote IT services and increase awareness and usage of Internet in the Kingdom.

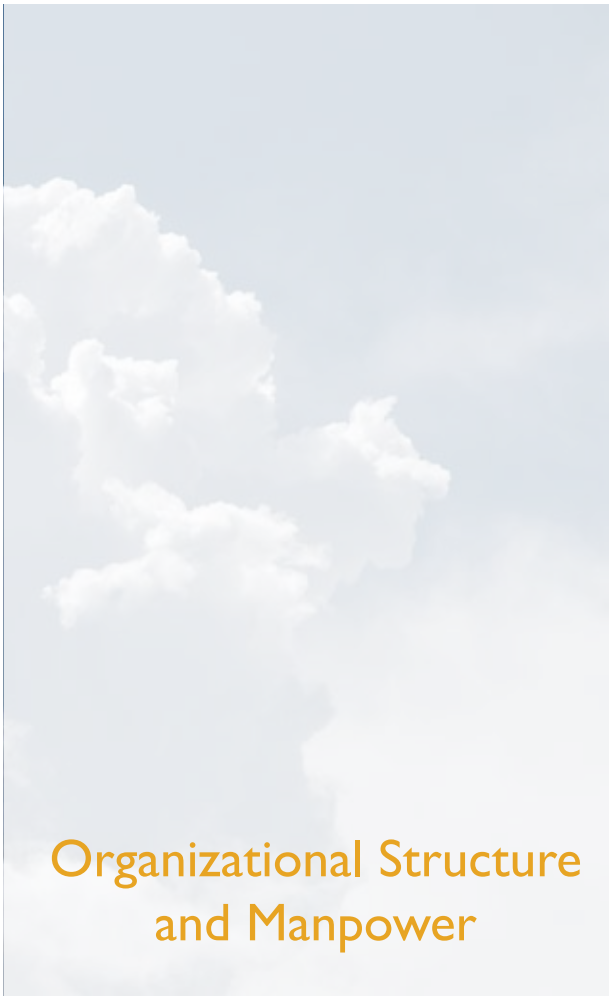
- To oversee Internet services provisioning and manage the national top-level domain name (.sa).
- To participate in e-Government and e-Commerce programs.
- To encourage research, development in the ICT sector and encourage modernization of networks and services.





His Excellency, the Governor in a group shot with some of the CITC employees





**Organizational Structure  
and Manpower**



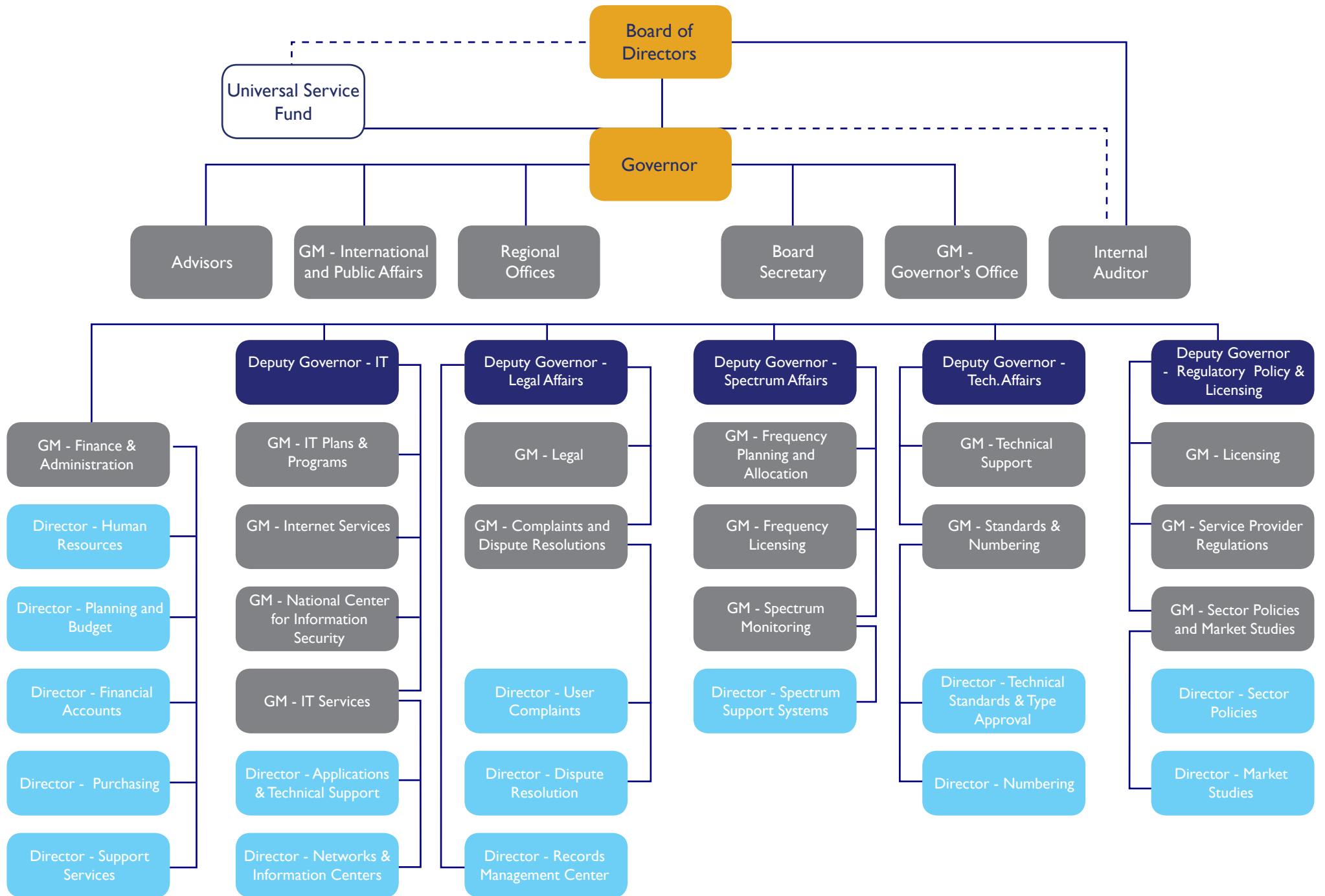
### 3 Organizational Structure and Manpower

The Governor of CITC is the chief executive officer. He supervises CITC's senior management as well as CITC's relations with external parties including Government entities and other stakeholders. Five Deputy Governors (Regulatory Policy & Licensing Affairs, Technical Affairs, Spectrum Affairs, Legal Affairs and IT), as well as several General Managers and Advisors report to the Governor. The organization structure is shown in the Chart on the next page.

CITC has been building a competent and motivated workforce through recruitment and development of highly qualified personnel. The total number of CITC staff reached 305 at the end of 2008, 97% of which are Saudis. The professional staff (engineers; IT specialists; technicians; financial, administrative and legal specialists) accounted for over 72% of total employees.

CITC has developed a Code of Conduct for its employees in order to ensure that the rights of all stakeholders are respected and that they are dealt with courteously, fairly and impartially; to safeguard against conflicts of interests, either real or perceived and to protect against misuse of authority. Excerpts from the Code of Conduct are published on CITC website (and reproduced in Appendix H of this Report).





هيئة الاتصالات وتقنية المعلومات  
Communications and Information Technology Commission  
www.citc.gov.sa



His Excellency, the Governor, presenting to the President of the Mobile Telecommunication Company "Zain" the third "Saudi Arabian" licence for mobile communication



Major Activities  
and Achievements  
in Year 2008



## 4 Major Activities and Achievements in Year 2008

### 4.1 Licensing and Promotion of Competition

CITC continued its drive to further liberalize the ICT markets, and increase competition. New licenses were issued and others were cancelled during the year. The total number of issued licenses reached 290 by the end of 2008. Details of the issued licenses are contained in Appendix E.

#### 4.1.1 Mobile Telecommunications Services

The third mobile services license was issued to Saudi Mobile Telecommunications Company (Saudi Zain) on 29th March 2008. CITC assisted the newly licensed company's rollout by helping to overcome obstacles faced in the implementation of its plans and by facilitating its interconnection with other networks. Saudi Zain launched its commercial services on 26th August 2008.

#### 4.1.2 Fixed Telecommunications Services

As part of the fixed services market liberalization and pursuant to the recommendation of CITC, the Council of Ministers issued its Resolution No. 38 dated 26/2/2008, approving the award of three new licenses to establish and operate public fixed telecommunication networks offering local, national and international services. The three fixed service providers are: Optical Communications Company (with Verizon of USA); Mutakamiliah (with PCCW of Hong Kong) and Atheeb (with Batelco of Bahrain). CITC is following up with the three new companies and the Capital Market Authority to complete the rest of the procedural steps for issuance of the three licenses.

### 4.2 National Frequency Plan (NFP)

The Council of Ministers approved the National Frequency Plan (NFP) in March 2008. The NFP was developed by CITC in 2007 in line with international best practices and was based on spectrum users needs. The NFP spectrum allocations for civil and commercial use are published on CITC's main website in both Arabic and English. CITC has started the implementation of the NFP, with a clear focus on compliance. Parties with assigned frequencies which do not conform to frequency band allocations specified in the NFP will be required to vacate their currently assigned frequencies and if necessary, will be assigned alternative frequencies as appropriate.

### 4.3 Reference Interconnection Offer (RIO)

As part of the periodic revision of the Reference Interconnection Offer (RIO) of STC, CITC held a public consultation on the amended second version of the RIO document in order to obtain the views of the stakeholders. Based on responses to the public consultation and a benchmarking analysis of international practices conducted in 2007, CITC required STC to execute a number of improvements to the RIO document. STC submitted a revised third version of the RIO document, incorporating the required amendments. CITC approved the revised RIO in the second quarter of 2008. The RIO document is available on the web sites of both STC and CITC. In the last quarter of 2008, CITC commenced the process for the next revision of the RIO.

#### 4.4 Reference Offer for Data Access (RODA)

In line with CITC Decision in 2007 (number 178/1428), approving STC's first version of the RODA document, and requiring STC to update within eighteen months, CITC initiated a process for revision of the RODA document. The review process includes an international benchmarking study as well as a public consultation process and is expected to be completed in 2009 with the approval and publication of the second version of the RODA document.

#### 4.5 Long Run Incremental Costing (LRIC)

In order to protect competition and safeguard against cross-subsidy, CITC determined that interconnection and wholesale prices should be cost based and decided to implement Long Run Incremental Costing (LRIC) as a best practice approach to identify the underlying costs of providing such services. The development of LRIC started in 2007.

During 2008, an extensive public consultation process was carried out (including an opportunity to provide comment-on-comments) on the LRIC Methodology Guidelines. Following a thorough analysis process of the responses, CITC revised the LRIC Methodology Guidelines, and the final document was presented to CITC Board. Upon the Board's approval of the LRIC Methodology Guidelines; CITC issued a Decision and published these guidelines on its website.

In building bottom-up LRIC models, service providers were required to provide extensive amount of data. In undertaking the data collection, several meetings were held with the service providers. Where there were gaps in the data required, it was obtained from international benchmarks. In this way, CITC completed building of the bottom-up LRIC Models for fixed and mobile services.

The next steps are to undertake the implementation of LRIC, which will include some consultation with service providers, an approval of the Board and the issuance of a CITC Decision.

#### 4.6 Terms and Conditions of Service

CITC document on "Terms & Conditions of Service" for mobile, fixed, data and internet services is designed to safeguard the public interest, protect consumer rights and define the rights and obligations of both clients and service providers. A public consultation was launched in late 2007 together with requests for comments from interested parties including the Shoura Council, other governmental entities, academic institutions, the private sector and the public.

During 2008, CITC analyzed all the responses and issued a Decision approving the final documents. CITC mandated the concerned service providers to abide by the approved terms and conditions of service, and to make them available at their subscription offices and on their web sites.

The approved Terms and Conditions of Service are published on CITC web site. CITC will ensure compliance with its Decision by the mobile, fixed, data and Internet service providers.

#### 4.7 Tariff Regulation

In accordance with its Statutes, CITC continued to regulate the service tariffs of STC, the current dominant service provider and issued the necessary decisions as detailed in Appendix (B) and available on CITC website.

## 4.8 Market Definitions and Dominance

The Market Definitions and Dominance project aims to identify relevant markets in the telecommunications sector in the Kingdom, designate dominant service provider(s) in each of the defined and relevant markets, determine ex-ante remedies to alleviate the negative effects of dominance on competition and to safeguard the public interest.

An international benchmarking of best practices was completed and a draft regulatory framework was prepared. CITC launched a two round public consultation process to seek stakeholder views on the subject and on a periodic process to be followed for market designations, dominance and ex-ante remedies. A detailed response report consisting of the comments received and CITC's analysis and conclusions was prepared. Subject to the Board's approval, the final Regulatory Framework will also be published in 2009.

## 4.9 Emergency and Disaster Recovery Plans

In order to ensure the continuity of communications services, facilities-based service providers must respond rapidly and communicate effectively to overcome emergencies and service disruptions, whether due to accidents or due to national disasters. They must also facilitate contact to emergency users such as police and relief agencies, when required. CITC periodically undertakes a review of the networks of facilities-based licensed service providers to ensure their reliability and resiliency to overcome points of failure, as well as their contingency plans in case of service outages. During the year, a survey of service providers was undertaken to assess the current situation and it was concluded that the level of readiness to face emergencies and recovery plans in the ICT sector needs improvement. CITC also conducted a benchmarking study of 12 countries on the best practices in this regard.

CITC developed a draft regulatory framework for emergencies and disaster recovery, as well as draft guidelines for the licensed facility based service providers. A public consultation on the two documents was conducted. The next steps are for CITC to finalize the required documents, present its findings to the Board for approval and issue a Decision on comprehensive disaster recovery planning.

In addition, a comprehensive report was prepared on the redundancy, reliability and resiliency of service providers' networks in the event of failure or interruption of services, together with reporting and escalation mechanisms.

## 4.10 Universal Service and Universal Access (US/UA)

In compliance with the Universal Service and Universal Access (US/UA) Policy, a Universal Service Fund (USF) was established in 2007 as a new unit with financial independence and a separate budget.

The USF started to prepare its strategic and annual operating plans, including the programs and projects that will be implemented to provide voice and Internet services in the remote and commercially non-profitable areas where adequate communication services are not currently available. As a first step, information was collected to determine the availability of various services in all areas of the Kingdom, including schools, hospitals, electricity, water, police, communications and other public services. Subsequently a comprehensive field survey was also completed to determine the availability of ICT services and to assess user requirements. A complete database has now been developed.

The USF is currently working to finalize the strategic and annual operating plans. The first service provisioning project is planned to be announced in the third quarter of 2009.



## 4.11 National Numbering Plan (NNP)

The project aim is to update the National Numbering Plan (NNP) to keep pace with future growth, to ensure the availability of adequate numbers and service codes and to provide the flexibility to accommodate new technologies and services, such as VoIP, NGN, and ENUM.

During the year, CITC reviewed urgent requests related to short codes and allocation of number ranges for fixed telecom services and it analyzed the current NNP and the regulation of short codes for SMS value-added services. Other studies performed were related to the current fees for allocation of number blocks; the need to regulate the numbers starting with symbols such as \* or #; and the impact of new technologies, such as NGN, on numbering and addressing requirements.

The next steps are to conduct a public consultation process in order to finalize and update the NNP.

## 4.12 Number Portability (NP)

The aim of this project is to develop guidelines for fixed number portability (FNP), to update the guidelines of mobile number portability (MNP) and to integrate the two as unified guidelines for overall number portability (NP). During the year, CITC carried out a detailed study of NP types, porting procedures, porting fees, the impact of new technologies, the integration between the current MNP and proposed FNP solutions, and the upgrade of the NP systems. The next steps are to conduct a public consultation process in order to finalize the number portability guidelines.

CITC also continued to regulate and manage the MNP. The third mobile licensee (Saudi Zain) was linked to the number portability database, proper tests were conducted, over 1000 complaints were processed, more than 200,000 mobile numbers were ported through the MNP central system and daily reports were followed up and analyzed.

## 4.13 Quality of Service (QoS) Indicators

In order to ensure that high quality ICT services are provided to users, CITC undertook a comprehensive review to update the general framework of QoS indicators, including revision of QoS indicators and targets in line with global trends, processes to verify the accuracy of reports by service providers and enforcement methods to handle non-compliance. CITC issued a draft of the updated QoS Scheme for public consultation, then reviewed and analyzed the responses. The QoS Scheme document will be finalized in 2009 to reflect comments received from stakeholders.

In addition, the quarterly QoS reports submitted by the dominant service provider, including the QoS of interconnect links were studied and analyzed and efforts were coordinated with the service providers to improve the QoS.

## 4.14 Guidelines for Rights of Way and Site Sharing

In order to meet their license obligations for network rollouts, service providers depend on the availability of the rights of way (RoW). During the year, CITC prepared a benchmark study of best practices in other countries; developed comparative studies on co-location of outside plant equipment and site sharing; prepared draft guidelines for RoW and site sharing; conducted a public consultation process to seek comments on the draft guidelines and received stakeholder comments. The responses will be reviewed and analyzed and the updated guidelines documents will be issued and communicated in 2009.

CITC also studied the issue of fees proposed by some municipalities for permits to construct towers and to dig on public roads. In this regard, a benchmark study of fees imposed in other countries was conducted and recommendations were formulated.

## 4.15 Measurement of RF Radiation from Base Stations

The aim of this ongoing program of radio frequency (RF) field measurements is to verify compliance with CITC guidelines on limiting the RF exposure from wireless base stations. In cooperation with leading academic and research institutions in the Kingdom, field measurements were conducted at over 120 wireless base stations across the Kingdom to compare the performance of the network service providers to international standards for human exposure. Measurements showed that radiation levels are much lower (by at least 300 times) than limits established by CITC based on international standards for human exposure.

In 2008, CITC signed two new agreements with national universities for field measurements in the Eastern and Western regions, starting in 2009.

In addition, CITC developed a draft document on “National Guidelines for Human Exposure to RF Electromagnetic Fields”. A public consultation on the guidelines document is planned to start in 2009, prior to finalization, issuance and enforcement.

## 4.16 Regulatory and Technical Guidelines

### 4.16.1 Promotional Offer

CITC developed regulatory guidelines detailing procedures and rules governing promotional offers in the competitive ICT markets. These regulatory guidelines aim at promoting fair and ethical competition, while safeguarding the interests of service providers and protecting user rights. The guidelines were issued by CITC Decision No 209/1429.

### 4.16.2 Wireless Local Area Network (WLAN/Wi-Fi) Usage

In view of continued strong growth in the use of the Wi-Fi networks and the requirements for indoor and outdoor usage, CITC developed a regulatory framework governing such use and issued it as Decision No 205/1429. The regulatory framework details the areas of operation and coverage, the obligations of the network services providers, the requirements for compliance by the equipment used and the frequencies identified for this service.

### 4.16.3 Definition of Active Mobile Subscribers

In order to accurately identify the actual number of mobile service subscribers, CITC has carried out a benchmarking study on a number of international markets. A public consultation was undertaken to define an active mobile service subscriber. Subsequently, CITC issued Decision No. 188/1428 defining an active mobile service subscriber and directing mobile service providers to comply with the decision by filing the required indicators to CITC.

### 4.16.4 Provisioning of Mobile Prepaid Services

A regulatory framework on selling and activating pre-paid SIM cards for mobile services was issued as CITC Decision No 215/1429. The regulatory framework lists steps

needed to take necessary precautions with the terms of service and conditions of sale and activation. It also details procedures for sale and activation through either the service providers themselves or through their authorized agents and/or distributors.

#### **4.16.5 Uniform Procedures to Terminate SMS Subscription**

CITC developed a regulation detailing application of uniform procedures by all service providers for subscriber initiated requests to terminate value added SMS service. The implementation of these guidelines is being monitored to ensure compliance by the relevant mobile service providers.

#### **4.16.6 Charity Collection through SMS**

Regulatory guidelines on the collection of charitable donations via SMS were established. The guidelines are intended to encourage charity donations while safeguarding against misuse of noble charity causes, reducing annoyance experienced by SMS recipients and ensuring that only duly authorized bodies can collect such charitable donations. CITC is following up on the implementation of these guidelines to ensure compliance by the SMS and mobile service providers.

#### **4.16.7 Amended Schedule of Fees for 4-, 5-, and 6-Digits Numbers**

Meeting the growing demand for short access codes has necessitated: a) the allocation of 5- and 6-digit codes according to the National Numbering Plan and b) the monitoring of depleted 3- and 4-digit codes. A benchmark study of other countries has revealed that most countries adjust charges to manage demand when supply is constrained by scarcity of number resources. Based on the Board approval, the fee schedule for 4-, 5-, and 6-digit numbers has been revised through CITC Decision No. 2007/1429.

#### **4.16.8 Allocation and Use of Short Access Codes**

Growth and increasing competition in the ICT sector have spurred the delivery of new services, with a consequent rise in demand for scarce numbering resources such as short access codes. A regulatory framework on the allocation of short access codes was approved by the Board, published on CITC web site and put into effect.

#### **4.16.9 Use of Nomadic Numbers**

Licensed service providers are planning to introduce new ICT services such as nomadic services, thereby increasing the demand for related numbering resources. CITC studied the number ranges for these services to meet long-term demand and be consistent with the general principles of the National Numbering Plan. Regulatory guidelines were developed for the structure, allocation and use of the nomadic numbers. These guidelines were issued and communicated to all service providers.

### **4.17 Internet Service and Domain Name Registration**

An "Internet Service Center" was established to fulfill the tasks of Internet service management, regulation and filtering. During 2008, 96,000 blocking/unblocking requests were processed; security queries were handled, the safe search feature and the new filtering management system (FMS2) were activated.

In view of the continued growth in Internet usage and to ensure fair and reliable registration of domain names in the Kingdom, the Saudi Network Information Center (NIC)

has continued the registration, management and technical supervision of the Internet domain names. During the year, the NIC handled the registration of over 2300 new domain names and the modification of around 2000 registered domain names. Three domain name related disputes were resolved. The registration of Arabic domain names also started in 2008 with 103 new Arabic domain names being registered.

As part of the Internet Development Project, a CITC led national task force has been formed to promote the evolution towards the use of version 6 of the Internet Protocol (IPv6) standard. The national IPv6 Task Force includes a number of service providers and other entities and participation is voluntary and open to interested parties. A test lab was set up for testing compliance with IPv6.

#### 4.18 The National Internet Exchange

The National Internet Exchange was established in Riyadh for the purposes of keeping national Internet traffic within the Kingdom. This will improve the quality of Internet service, reduce costs and prices, increase reliability and security and maintain the privacy of local internet users. The National Internet Exchange is currently being tested in preparation for a launch in 2009.

#### 4.19 National Center for Information Security (CERT)

The “National Center for Information Security (CERT-SA)” established in 2006, aims to raise awareness and knowledge of the risks and threats that affect the security of information, to coordinate the efforts of prevention, detection and response to information security incidents at the national level. Continuing its security protection activities, CERT-SA established the Internet Security Services Center, which started operation in 2008.

#### 4.20 Anti-SPAM Program

Continuing the activities initiated last year by the Saudi National Anti-SPAM Program, the final reports containing proposed solutions to reduce the SPAM problem were published in six volumes in both Arabic and English. An implementation plan, divided into nine initiatives, was prepared to follow up with the recommendations. SPAM awareness raising materials were prepared and published; an official website was launched ([www.spam.gov.sa](http://www.spam.gov.sa)) and a public workshop was organized to introduce the program documents. A draft regulatory framework document was developed and a public consultation was conducted. The responses will be analyzed and the final regulatory framework document is planned for completion in 2009.

#### 4.21 Information Security Manual

CITC initiated steps to implement the Council of Ministers’ Resolution No. 194, dated 10/06/1428H (June 2007) calling for the preparation of a framework manual on information security policies and procedures in the government sector and for its circulation to government agencies. CITC has developed a phased approach for the preparation of the manual including information classification, the security policy areas and the responsibilities of the information security auditor. The framework manual is planned to be completed during 2009.

## 4.22 Violations and Dispute Resolutions

CITC Violations Committee considered 1092 reported violations of the Telecommunications Act and issued appropriate decisions in accordance with the applicable statutes. With regard to dispute resolution, CITC developed procedures to resolve the disputes that arise between service providers. A number of disputes between licensed providers were considered and appropriate decisions were issued in accordance with the Telecom Act and the Bylaw.

## 4.23 Consumer Complaints

In accordance with CITC Statutes requiring the Commission to protect ICT consumer rights, CITC handled and resolved 3218 complaints during the year. In order to increase CITC efficiency and effectiveness in processing complaints, a procedures document for handling complaints was finalized during the year.

## 4.24 Media Activity

The CITC continued its active role of increasing public awareness and proactive engagement with the press and media. During 2008, a number of activities were undertaken, the details of which are available in Appendix D-6.

## 4.25 Telecommunications Services during Ramadan and Hajj

In cooperation with other Government agencies, CITC worked to ensure provision of the best ICT services to pilgrims. A CITC task force of specialists was formed to follow up on the performance of licensed service providers in Makkah, Madinah and the Hajj areas. Detailed activities are listed in Appendix D-7.

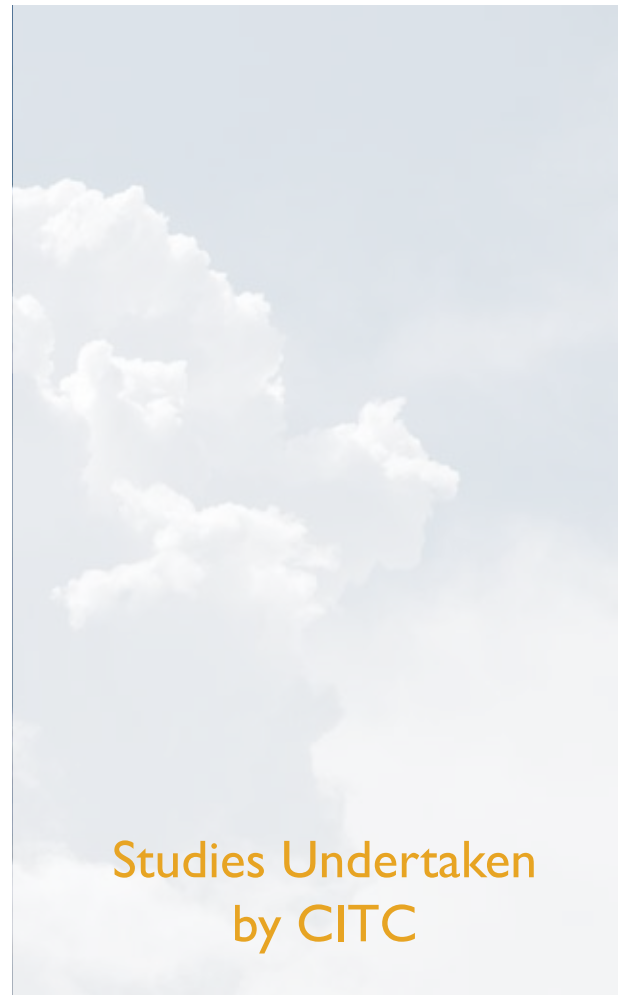
## 4.26 Other Activities and Achievements

In addition to the major achievements highlighted in this Section, CITC has carried out many other activities as detailed in Appendix D.





A visit of a high-level Malaysian delegate to the CITC



Studies Undertaken  
by CITC



## 5. Studies Undertaken by CITC

CITC carried out a number of studies during the year towards achieving the objectives of its Strategic Plan. Some of the key studies are as follows:

### 5.1 Internet Usage in KSA

The aim of this field survey study is to identify key indicators of Internet usage in the Kingdom, the habits and patterns of Internet usage, as well as the level of satisfaction with current Internet service. The study also focuses on those who are not using the Internet, with an analysis of the reasons and/or obstacles that prevent them from accessing Internet service. The market survey study is conducted in three phases over a number of years.

The first survey phase was completed in late 2007. It included completion of a field survey of all categories of Internet users and the preparation of a draft document on Internet Usage Indicators. The main findings of the study are available on CITC web site.

The second phase of the market field survey (2008/2009) is ongoing and is planned for completion in the first half of 2009, the results of which will also be published.

### 5.2 Electronic Readiness for Small & Medium Enterprises

The aim of this project is to study the market conditions and divide small and medium enterprises (SMEs) according to their sector, size, location and type of internal or external operation. The objective is to assess their requirements, their ability to deal with and make use of ICT technology and services, the reasons for any non-usage and the difficulties they face, in order to develop appropriate mechanisms to raise awareness and promote the increased adoption of IT by SMEs.

The SMEs that are currently using IT were segmented, their future usage estimated, and their key objectives and the challenges they face were defined in terms of their activities, the sequence of their operations and the constraints they face with respect to human resources.

Work is underway to identify gaps between supply and demand, propose appropriate solutions and then test these solutions with focus groups in the three major cities of Riyadh, Jeddah and Dammam. The final recommendations of the study will then be determined.

### 5.3 Exemption from Company Law

A telecommunications service provider requested exemption from Article (1) of the Saudi Arabian Companies Law, allowing it to incorporate separate companies and maintain the independent legal entities for each company. CITC examined and analyzed all of the relevant aspects of this request, benchmarked the legislative and regulatory climate of the best practices of European and Arab states who allowed the creation of a legal entity by one person and assessed the positive and negative economic and legal aspects of doing this.

The study recommended the exemption of all facilities-based telecom service providers from Article (1) of the Companies Law, allowing them to form a “one-person company”. The Council of Ministers issued a Resolution approving CITC’s recommendation. Subsequently, a Royal Decree No M/3, dated 9/1/1430H (06/01/2009), was issued to enact the Council’s Resolution.



## 5.4 One Network Studies

CITC prepared a study on the “One-Network” service proposed by Saudi Zain and similar such offers by other mobile service providers. The concept of the service exempts charging a call recipient during roaming in or from participating networks in other countries. In addition to CITC’s internal study, two other independent studies were carried out by two separate consulting firms. The three studies included economic models to assess the potential effects on the communications sector and its revenues in addition to its impact on national security. The results of the three studies were presented to the Board and a Decision was issued by CITC based on the Board’s resolution.

## 5.5 Broadband over Power Line

A comprehensive study was carried out to examine the feasibility of provisioning broadband services over power line (BPL). The study, which was performed in cooperation with the World Bank, included comparisons with other technologies, BPL advantages and limitations and recommendations on CITC’s role with regard to the use of BPL in Saudi Arabia.

## 5.6 Aesthetics of Mobile Communication Towers

The proliferation of communications towers is a difficult issue facing regulatory bodies worldwide. In the Kingdom, this is a matter of great interest to CITC and other relevant government agencies. The rapid deployment of telecommunications services has generated growing needs for service providers to place towers and antennas in urban, suburban and rural area across Saudi Arabia, using both public and private property including residential areas, major roads and rooftops. The public reaction to this is a concern for relevant authorities in countries striving to develop technical, environmental and legal rules and regulations concerning communications towers, especially for wireless services.

CITC carried out a detailed study on aesthetics and environmental considerations of telecom towers. The study reviewed the experiences of other countries in relation to the regulation of the aesthetics of wireless communications towers. Regulators and municipalities verify conformance to the rules and regulations via field tests and periodic site visits upon receipt of complaints. Some countries also have rules and regulations on the aesthetics of communications towers. CITC completed its study with appropriate recommendations to preserve the appearance of the landscape by finding ways to reduce the random spread of towers and antennas, especially on rooftops. CITC communicated the study recommendations to the licensed service providers and directed their compliance.

## 5.7 Other Studies

In addition to the studies highlighted above, CITC carried out other studies as included in Appendix D.



Some of the CITC employees while attending a training program



**Strategic Plan  
and 2009 Key Activities**



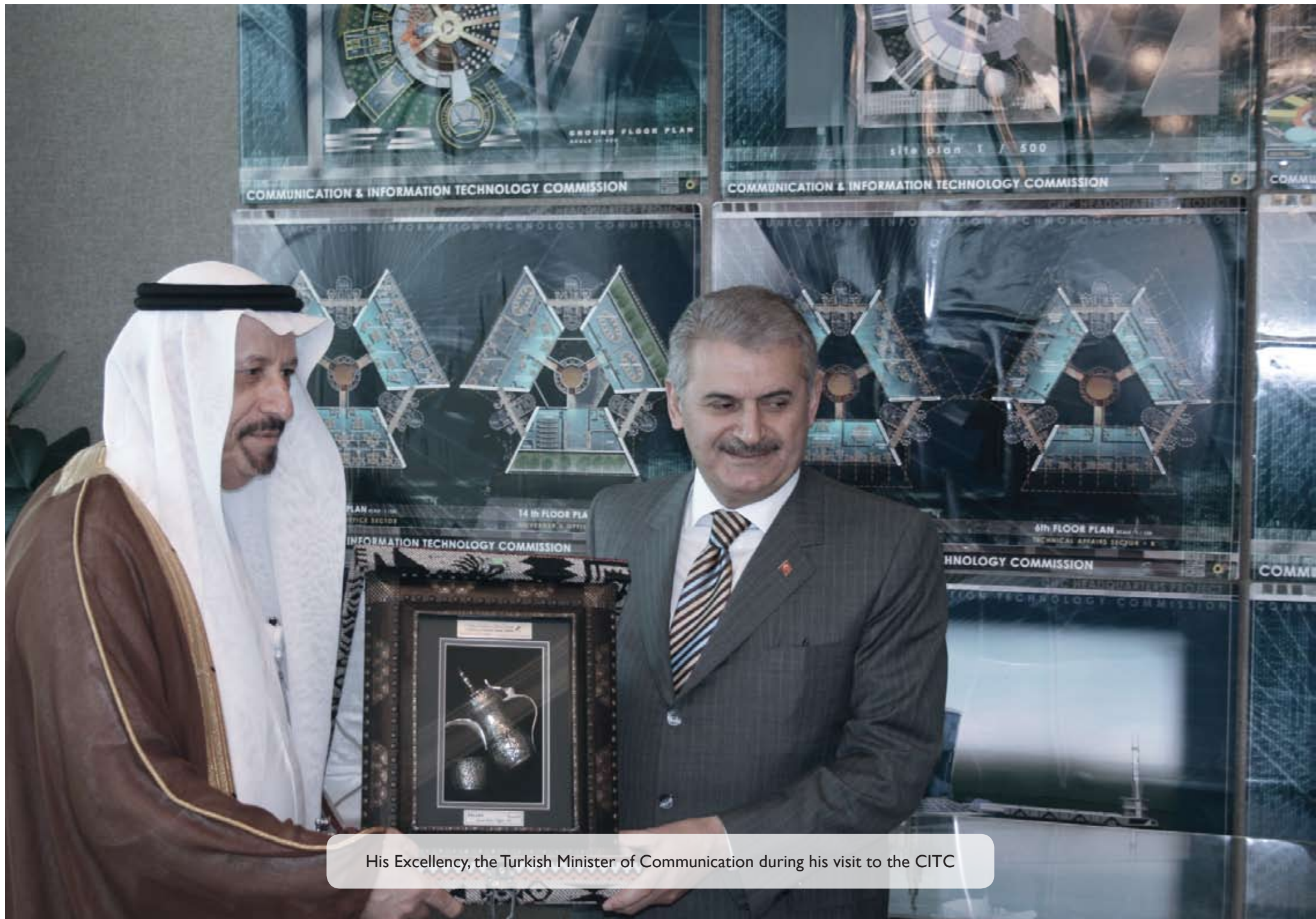
## 6. Strategic Plan and 2009 Key Activities

In carrying out its mandate, CITC has planned the following projects during the next fiscal year (2009):

1. Complete the requirements to issue licenses to the three selected fixed telecommunications service providers.
2. Follow up on the implementation of the "National Frequency Plan".
3. Complete the update of the Reference Interconnection Offer (RIO).
4. Complete the update of the Reference Offer for Data Access (RODA).
5. Complete the LRIC project including its implementation plan.
6. Continue tariff regulation of relevant telecommunications services.
7. Finalize the telecom markets definitions, designate dominant operators in each relevant market and implement ex-ante regulations.
8. Finalize the regulatory framework on ICT disaster recovery plans.
9. Update the accounting separation policy.
10. Develop the anti-SPAM regulatory framework.
11. Conduct a thorough study of the Kingdom's ICT Market.
12. Launch operations of the National Internet Exchange and develop a regulation for keeping national Internet traffic within the Kingdom.
13. Complete the strategic and annual operating plans of the Universal Service Fund.

14. Launch the first pilot project of the Universal Service Fund.
15. Continue to update the ICT equipment technical specifications.
16. Complete the revision of the National Numbering Plan and its management system.
17. Finalize the Fixed Number Portability guidelines.
18. Prepare carrier selection guidelines.
19. Complete the second phase of the measurement of mobile network performance.
20. Continue the RF field measurement program.
21. Complete the general framework of the technical aspects of the external networks.
22. Complete the development of the QoS Scheme.
23. Continue to review and update of CITC Statutes and regulations.
24. Complete the second wave of the Internet usage field survey.
25. Carry on the activities of the Anti-SPAM national project.
26. Implement a program to increase public awareness and usage of the Internet.
27. Follow up the IPv6 migration program.





His Excellency, the Turkish Minister of Communication during his visit to the CITC



## Appendices

- A** Board of Directors Decisions
- B** CITC Decisions
- C** Public Consultations
- D** Other Activities and Achievements
- E** Licenses Issued
- F** CITC Web Sites
- G** CITC Financial Accounts
- H** Excerpts from the CITC Staff Code of Conduct



## Appendix (A): Board of Directors Decisions

The Board held seven meetings in 2008. The major decisions taken during the year include:

- Approval in principle of the One Network service and similar offers, requiring the service provider to set defined tariffs for terminating international calls to/from the Kingdom while roaming inside the networks affiliated with the One Network concept or the networks included in similar offers. CITC shall review and update such tariffs periodically according to market developments.
- Approval of the amended fee schedule for the use of 4-, 5-, and 6-digit numbers.
- Approval of Guidelines on short code assignment and usage.
- Approval of the LRIC Methodology Guidelines.
- Approval of Saudi Telecom Company (STC) acquisition of 35% share of Oger Telecom.
- Approval of Arab Supply and Trading Co. (ASTRA) purchase of a share in Bayanat Al-Oula Network Services Company.
- Approval of Etihad Etisalat (Mobily) acquisition of 99% of the shares of Bayanat Al-Oula Network Services Company.
- Approval of Etihad Etisalat (Mobily) acquisition of 96% of the shares of in Zajel International Telecommunications Company.
- Formation of an Executive Committee of the Board.
- Formation of a Board Committee on the “National Internet Exchange”.
- Re-formation of Board Committee on the Universal Service Fund.
- Approval of the CITC budget for Fiscal Year 2009.
- Approval of the Universal Service Fund budget for Fiscal Year 2009.
- Endorsement of the proposed budget of the National Committee for Information Society for Fiscal Year 2009.
- Appointment of the Talal Abu-Ghazaleh & Co. to audit the accounts of CITC for the three years 2008-2010.
- Endorsement of the financial statements of the CITC for Fiscal Year 2007.
- Endorsement of the final accounts of the USF for Fiscal Year 2007.
- Approval of the conclusions of the “value engineering” study of CITC headquarters building in Riyadh, merging its two stages and re-tendering in one bidding competition.
- Award of building CITC headquarters in Riyadh to Construction Contracting and Projects Company Ltd.



## Appendix (B): CITC Decisions

Decision #	Date	Subject
188/1428	4/1/1429	Definition of “Active Mobile Subscriber”
190/1428	26/12/1428	Approval of Al-Hatif proposed service for high speed DSL AFAQ (8Mbps).
191/1428	27/12/1428	Approval of Al-Hatif proposed service for high speed DSL AFAQ (10Mbps).
192/1429	5/2/1429	Approval of STC modified tariffs for business IP-VPN services.
193/1429	10/2/1429	Approval of STC modified tariffs for DLL services.
194/1429	23/2/1429	Approval of LRIC Methodology Guidelines.
195/1429	11/3/1429	Approval of the Terms of Service documents for Mobile, Fixed, Data and Internet Services.
196/1429	9/3/1429	Resolution of dispute between service providers on inclusion of commercial provisioning fees and license fees.
197/1429	9/3/1429	Resolution of dispute over interconnection.
198/1429	9/3/1429	Resolution of dispute over bank guarantees.
199/1429	9/3/1429	Resolution of dispute over financial dues resulting from international traffic.
200/1429	9/3/1429	Resolution of dispute between service providers on call termination.
201/1429	9/3/1429	Resolution of dispute between service providers on national roaming.
202/1429	23/3/1429	Approval of Al-Hatif proposed tariffs for new premium value service.
203/1429	29/3/1429	Approval of STC proposed tariffs for new iDEN public radio trunking services (Bravo).
204/1429	23/3/1429	Approval of the final revised RIO submitted by STC.
205/1429	28/4/1429	Wireless Local Area Network (WLAN/Wi-Fi) Usage Regulations.
206/1429	10/6/1429	Approval of STC proposal to terminate free directory calls (905).
207/1429	27/6/1429	Updated Tariff Schedules for 4-, 5- and 6-digit access codes.

208/1429	12/7/1429	Approval of Al-Hatif proposed services for high speed DSL AFAQ (16Mbps and 20 Mbps).
209/1429	1/8/1429	Regulatory guidelines in promotional offers.
210/1429	4/8/1429	Approval of Al-Jawal proposed new post-paid service packages (Zero, Zero and Laki).
211/1429	9/8/1429	Approval of STC proposed features of the IP-VPN service for business.
212/1429	9/8/1429	Approval of STC modified tariffs for Dedicated Internet Access (DIA) services.
213/1429	12/8/1429	Approval of modified tariffs for Al-Jawal Group.
214/1429	19/8/1429	Approval of Al-Hatif proposed new services (Tele-voting and Voice Message Delivery).
215/1429	24/8/1429	Guidelines for provisioning of mobile prepaid services (selling and activation).
216/1429	17/9/1429	Mechanisms for Authentication and Update of ID Records for mobile subscribers.
217/1429	17/9/1429	Approval of STC reduced tariffs for specific Internet services.
218/1429	20/10/1429	Approval of Al-Hatif proposed new service (Premium Plus Plan).
219/1429	26/10/1429	Approval of Bravo proposed new service package (Bravo 155).
220/1429	13/11/1429	Approval of Al-Jawal proposed new service (JAWALNet Data SIM Card).
221/1429	13/11/1429	Approval of STC reduced tariff for International IP-VPN Service.
222/1429	23/12/1429	Approval of Al-Jawal proposed new service (Business Jawal).

## Appendix (C): Public Consultations

<b>Public Notice No.</b>	<b>Date</b>	<b>Subject</b>
1/1429	31/5/2008	Telecommunications Market Definition and Dominance
2/1429	17/6/2008	Quality of Service Scheme for the Kingdom of Saudi Arabia
3/1429	30/7/2008	Rights of Way Guidelines and Co-location for Outside Plant (OSP) Guidelines
4/1429	23/8/2008	Regulatory Framework and Guidelines on Disaster Preparedness, Recovery Planning and Notification
5/1429	14/10/2008	Second Public Consultation on Rights of Way Guidelines and Co-location for Outside Plant (OSP) Guidelines
6/1429	16/12/2008	Second Public Consultation on Designation of Telecommunications Markets for Dominance

## Appendix (D): Other Activities and Achievements

In addition to the main achievements contained in Section 4 of this report, CITC's other activities and achievements are summarized as follows:

### D-1 Study of Acquisition and Mergers of ICT Companies

- Arab Supply and Trading Co. (ASTRA) purchase of a share in Bayanat Al-Oula Network Services Company.
- Saudi Telecom Co. (STC) acquisition of 35% share of Oger Telecom.
- Etihad Etisalat (Mobily) acquisition of 99% of Bayanat Al-Oula Network Services Company.
- Etihad Etisalat (Mobily) acquisition of 96% of Zajel International Telecommunications Company.

### D-2 Frequency Spectrum:

- Assigned 3300 frequencies and recorded some assignments with the ITU for protection from the harmful interferences.
- Cancelled 4855 frequency assignments.
- Issued and renewed licenses:
  - a. 1,300 for radio systems installed onboard ships, excursion and fishing boats,
  - b. 319 for amateur radio and 310 for the usage of amateur radio station frequencies and
  - c. 516 for radio stations for aeronautical navigation services.
- Updated 10,000 frequency assignments.
- Handled 156 frequency requests from visiting foreign officials and foreign ships to Saudi ports.
- Coordinated 625 applications for spectrum assignments of the Saudi satellites and ARABSAT satellites with other countries.
- Processed 27 requests for spectrum coordination between KSA and GCC countries.
- Investigated 208 interference reports.
- Monitored over 30,000 frequency transmissions to identify unauthorized spectrum use.
- Measured over 14,000 authorized license frequencies to verify compliance with license terms and conditions.
- Identified 8,804 unauthorized frequency transmissions and located their sources and users.
- Monitored frequencies allocated for safety and rescue services, which are related to the lives of people, to ensure that they are free from harmful interference.
- Studied over 3,500 ITU circular letters for interference protection of current frequency users, 1,531 of which resulted in coordination actions with other entities.

### D-3 ICT Equipment:

- Improved equipment clearance procedures to shorten turnaround time to within 24 hours, in response to Customs release requests.

- Coordinated with Customs to release equipment directly to licensed service providers in order to expedite their network rollouts.
- Handled over 1,300 applications for equipment approval and evaluated 12,700 Customs release requests.
- Responded to over 500 inquiries related to equipment technical standards.
- Prepared and published 58 technical specifications covering most ICT applications. Also prepared specifications for Picnic Radio and ancillary equipment (Barary) and updated regulations for importation and use of wireless local area networks (WLAN/WiFi) equipment and networks.

#### D-4 Technical Support to Government Agencies on ICT Issues:

- Studied the Ministry of Transport request for the usage of Automatic Vehicle Location (AVL) systems for land transport vehicles.
- Studied the Ministry of Transport request for a system for Long Range Identification and Tracking of ships (LRIT) and provided technical and regulatory views.
- Coordinated with the King Abdulaziz City for Science and Technology (KACST), mobile service providers and providers of emergency services (Red Crescent, the Civil Defense, and Public Security) to enable the emergency service providers to locate the emergency service callers, reach out on a timely basis and provide the services quickly and effectively.
- Studied the routes of the telecom networks that may impede railway train tracks of the holy shrines, and provided the Ministry of Municipal and Rural Affairs with the required maps and information.

#### D-5 Technical Support to Telecom Service Providers:

- Studied Etihad Etisalat (Mobily)'s request for the construction of a 90 meter high tower in, Madinah, on an exceptional basis.
- Studied Saudi Zain's request for the operation of international roaming service in Iraq, utilizing the available traffic channels of the existing operators.
- Examined STC's compliance of existing towers and relay stations for mobile and fixed telecommunications network in Jeddah area, with the regulations issued by the Ministry of Municipal and Rural Affairs.
- Assisted Zain in obtaining appropriate locations to erect towers and roll out their mobile network within Saudi Aramco compounds and lands.

#### D-6 Media Activity:

- Participated in a number of conferences, forums and exhibitions.
- Held a number of public workshops (e.g. Anti-spam workshop).
- Published advertisements in newspapers for some CITC projects and public consultations.
- Issued press releases on various activities of CITC.
- Coordinated press and television interviews of senior officials of CITC, with different local and foreign media.
- Issued a daily electronic press clipping file of CITC and sector related news and articles appearing in newspapers and on various web sites.
- Issued an internal monthly report, measuring CITC presence in the media.
- Coordinated responses to public inquiries received via CITC contact e-mail ([info@citc.gov.sa](mailto:info@citc.gov.sa)).

- Participated in related exhibitions (such as GITEX-Riyadh, 2008).
- Coordinated a variety of publications on CITC regulations and studies of interest.
- Emphasized internal communication with CITC employees through e-mail and other e-distribution channels.

## D-7 Supervision of Telecom Services during Ramadan and Hajj Seasons, 2008:

- Carried out a spectrum monitoring survey around the Holy Mosque and Hajj areas to ensure there was no harmful interference.
- Conducted quality of service (QoS) measurements for mobile services and public trunk radio (Bravo) in the area of the Holy Mosque in Makkah, the holy sites and the highway road between the holy sites.
- Monitored the fixed, pay phone, internet services and free Wi-Fi Internet services in Mina, Muzdalifah, Arafat and the Holy Mosque in Makkah.
- Coordinated activities of government agencies and the service providers to ensure pilgrims' requirements for the telecom services.
- Conducted field visits to service providers and reviewed the performance of their networks.
- Carried out field visits to some government departments exploring views of the officials on the telecom services in Hajj.
- Conducted user surveys among pilgrims.
- Responded to user complaints to resolve them expeditiously.

## D-8 Participation in Local, Regional and International Events

- Participated in many Local, Regional and International meetings and conferences, including:
  - a. ICT related meetings of the Gulf Cooperation Council (GCC).
  - b. ICT related meetings of the League of Arab States (LAS).
  - c. The Arab Regulatory Network (AREGNET).
  - d. World Telecommunication Standardization Assembly (WTSA).
  - e. International Telecommunications Union Council, and other ITU meetings.
- Attended numerous local and international conferences and CITC was the main Speaker in a number of such events, such as:
  - a. The Third Public Relations Forum, Jeddah.
  - b. Jeddah Chamber of Commerce and Industry.
  - c. Third Meeting on e-Services in Eastern Province, Dammam.
  - d. The Saudi Telecommunications Society, Riyadh.
  - e. Meetings of the Arab Team for Domain Names, Cairo.
  - f. ITU Regional Workshop on "The Future of Voice", Salalah, Oman.
  - g. WiMAX World EMEA, May 19-21 in Munich, Germany.
  - h. 4th Power Line Communication (PLC) Asia 2008, Hong Kong.

## Appendix (E): Licenses Issued

### E-I Total Number of Licensees by Year:

Service	2003	2004	2005	2006	2007	2008
Fixed Telecom Service	1	1	1	1	1	1
Mobile Service	1	2	2	2	2	3
Data Communications	1	3	3	3	3	3
Internet Service	18	23	27	47	64	53
VSAT	5	5	5	7	13	14
GMPCS Service	2	2	2	3	3	3
Internet Aeronautical Service	-	1	1	1	1	1
Mobile Aeronautical Service	-	-	-	1	2	1
Automated Vehicle Location	-	6	19	24	33	26
Bulk SMS Service	-	6	38	92	122	135
Audio Text (700) Service	-	-	21	26	24	24
Call Center Service	-	-	4	7	11	10
Electronic Wallet Service	-	-	2	2	5	5
Mobile Service Recharging Card Service	-	-	1	4	4	4
Network Control & Management	-	-	2	3	4	3
Automatic Calling	-	-	-	-	1	-
ICT Equipment Hosting	-	-	-	-	1	3
Interactive Voice Messaging	-	-	-	-	-	1
<b>TOTAL</b>	<b>26</b>	<b>49</b>	<b>128</b>	<b>223</b>	<b>294</b>	<b>290</b>

## E-2 List of Licensees:

### License Type: Fixed Line Telephone Services (1 License)

1	Saudi Telecom Company (STC)
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### License Type: Mobile Telecom Services (3 Licenses)

1	Etihad Etisalat Company (Mobily)
2	Saudi Telecom Company (STC)
3	MTC Saudi Arabia (Zain)

### License Type: Data Service Providers (DSP) (3 Licenses)

1	Integrated Telecom Co. Ltd.
2	Saudi Telecom Company (STC)
3	Bayanat Al-Oula for Network Services

### License Type: Internet Services Provider (ISP) (53 Licenses)

1	Zafa Company Limited
2	MeduNet
3	Electro Tasdeed Est.
4	Integrated Networks LLC
5	British Telecom Al-Saudia
6	Saudi Net Link Company Ltd.
7	Gulf Computer Services Company (SPSNET)
8	Zajoul for Advanced Communication Technology
9	Digital Solutions Provider
10	Channels Center for Electronic Devices
11	Perfect Presentation Company
12	City Net Establishment
13	International Gulf Gaihab Establishment

14	Dar Al-Mustawrad Establishment for Trade (IT)
15	Electronia Company
16	Current Technology Enterprise
17	WIDE BAND
18	Saudi Research and Publishing Company (SRPC)
19	LINKdotNET Saudi Arabia Ltd.
20	ICC Electronic Service
21	Arab Circle Company for Internet Services
22	Green Network Company Ltd.
23	E - Learning & Training Co.
24	National Advanced Systems Co. Ltd. (NASCO)
25	Mohamed Munassar Alesayi Group & Ali Hussein Alsawadi Group and Co. DreamNet)
26	Eker Communications and IT Ltd.
27	Nour Communications Company (NourNet)
28	Bayanat Al-Oula for Network Services
29	Juraisy Internet Services Limited
30	Arabian Internet and Communications Services Company (Awalnet)
31	Gulfnet KSA (Zajil)
32	Saudi Business Machines Ltd. (SBM)
33	Saudi Telecom Company (Saudi Net)
34	Integrated Telecom Co. Ltd.
35	AlFarida Information Technology Co.
36	Voice & Data Telecommunication Company
37	NESMA National Co. for Advanced Technology Ltd.
38	Al-Jazirah Network for Internet Services
39	Samir Photographic Supplies Ltd
40	Sahara Network Co. Ltd
41	Detecon Al Saudia Co. Ltd. (DETASAD)
42	Uni BHR Telecom
43	Arabian Electronic Network



44	Nasser H Al Harbi Trading Establishment (Al Harbi Telecom)
45	P - Group Saudi Arabia
46	Shaheer Technics Inc.
47	International Computer Company (ICC)
48	Saudi Internet Company
49	SAMBA Financial Group
50	Etihad Etisalat Company (Mobily)
51	MTC Saudi Arabia (Zain)
52	Middle East Internet Co. Ltd. (Cyberia)
53	Al-Rajhi Saudi Group

#### License Type: VSAT Services (14 Licenses)

1	Baud Telecom Company
2	Atlas Albilad Advanced Technology for Communications
3	Electronia Company
4	Channels Center for Electronic Devices
5	Saudi Telecom Company (STC)
6	Integrated Telecom Co. Ltd.
7	SKYBAND
8	High Capabilities Technologies Company Ltd.
9	Detecon Al Saudia Co. Ltd. (DETASAD)
10	British Telecom Al-Saudia
11	Nasser H Al Harbi Trading Establishment (Al Harbi Telecom)
12	Saudi Net Link Company Ltd.
13	Computer World & Technology Company
14	Showtime

#### License Type: Global Mobile Personal Communication Services (GMPCS) (3 Licenses)

1	Iridium Satellite LLC
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2	Thuraya Satellite Telecommunications Company
3	Farhan Commercial Company Ltd. (Thuraya Services)

#### License Type: Aeronautical Internet Service (Internet over the Airplane) (1 License)

1	Connexion by Boeing
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#### License Type: Aeronautical Mobile Service (Mobile over the Airplane) (1 License)

1	DataStar International Ltd.
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#### License Type: Automatic Vehicle Location (AVL) (26 Licenses)

1	SeQureME
2	Farhan Commercial Company Ltd. (Thuraya Services)
3	ExpTec Establishment for Technology and Programming Solutions
4	Abdullatif Alarfaj & Brothers Holding Company
5	Omnitec International Group
6	Electronia Company
7	Sahl Vehicles Services Co.
8	Zultec Fleet Management Company Ltd.
9	Technology Gates Computer Establishment
10	Industrial Projects Technologies Co.
11	Anbit Arabia Company Limited
12	Al-Motabei for Electronic Systems
13	Arabian Company for Petrol Services Ltd.
14	GulfNet Solutions Est.
15	Numerical Data Company Ltd.
16	Third Dimension Technology Limited
17	DataStar International Ltd.
18	Daleelteq IT Company Ltd.
19	Fleet Tracking Technologies Co.

20	AlBassami International Business Group Co.
21	Saudi Net Link Company Ltd.
22	Al-Majal G4S
23	iColPlus Company Ltd.
24	AlZilai Computer Est.
25	Advanced Electronics Co. Ltd.(AECL)
26	Almisehal Group for Trade Ltd.

#### License Type: Bulk SMS (135 Licenses)

1	Jibal Advertising for Information Technology
2	Mobile Innovative Solutions Company
3	First Gulf Contracting Company Ltd.
4	Eker Communications and IT Ltd.
5	Sky Telecommunications Ltd.
6	Mashail Alkhaleej Electronics Establishment
7	Tajseed Technologies Company Limited
8	Mubasher International Company (affiliate of NTG)
9	Media Station Promotion Agency
10	Enjazz Development Services Company
11	Perfect Presentation Company
12	Tawasul Communications Limited
13	Arabian Internet and Communications Services Company (Awalnet)
14	MeduNet
15	Saudi Bells Telecommunications Company
16	Advertising Services Company
17	Baraheen International Company
18	SAB Communications
19	Bait Alelam Media Production Establishment
20	E - Learning & Training Co.

21	Smart Call Co.
22	NESMA National Co. for Advanced Technology Ltd.
23	Saudi Trading & Resources Co. Ltd.
24	Tjari Commercial Co. Ltd.
25	Nal Investment Corporation Ltd.
26	Gulfnet KSA (Zajil)
27	Voice & Data Telecommunication Company
28	Zafa Company Limited
29	Farhan Commercial Company Ltd. (Thuraya Services)
30	Arabs Call Company Limited
31	Interkey Company for Communication and Computer
32	Applied Technologies Company
33	Dar Al-Ikhtera Aldaulia Co. for Trading
34	Al-Jazirah Corporation for press, printing, and publishing
35	Itsalat International Company (i2)
36	Alwataniya Advertising Company
37	Peacock Advertising and Promotion Company
38	Mawarid Electronics Company Ltd.
39	Al-Safhah Al-Thahabiah Trading Establishment
40	Arabian Advanced Systems Company
41	Ghraa Telecom Company
42	Advanced Electronics Co. Ltd.(AECL)
43	Ataas Trading Company
44	iColPlus Company Ltd.
45	Electronic Concepts Company Ltd.
46	Nour Communications Company (NourNet)
47	Unique Business Group Arabia (UBG)
48	Mediacall Company Ltd.
49	MOBILINK Company

50	Hash Est.
51	Masian Establishment for Marketing
52	Communications Cadres Trading Establishment
53	ZAAF Net Co.
54	Golden Assets Co.
55	Hams AlShams Est.
56	Arabian for Science & Technology
57	First for Science & Technology Co.
58	Data Technology Est.
59	One Card
60	Electro Tasdeed Est.
61	Sela Trading Company
62	Value for Communication
63	Ezz Elkhair for Development and Support Est.
64	Transworld Publicity Co. Ltd.
65	AlMotahaddeth Est.
66	Lead Marketing and Communication LLC
67	International Specialized Services Company Ltd. (BAB)
68	Interactive Media Est.
69	Rwasel Tech Trading Est.
70	Globe Messenger Comm. & Tech Co.
71	SOLEX Plus
72	The Health Media I.T. Est.
73	abdulhadi ali al al-rahilah Foundation for Trading
74	Marje3
75	Bowwabat Almajd co.
76	Qimam Info. Est.
77	Samama Technology
78	One Network Telecom

79	Saudi Pearl Company
80	Mashaal Alasemah Trading Est.
81	Tech Systems Est.
82	Uni BHR Telecom
83	Leham Est. for Trading
84	Enjaz Engineering Contracting Est.
85	Telecom and Technology Est.
86	Mobile me for Communications
87	International Company for Mobile Services
88	Ideal Execution Services Est.
89	Rannat Est. for Trading
90	Typical Network Est.
91	BAB International Corp. for Specialized Services
92	Saudi Research and Publishing Company (SRPC)
93	Sara Telecom
94	First for Information Technology Services
95	Watt Systems
96	Mohammed Sowaileh Al-Fitaikha Est., Branch of Al-Ayen
97	Arabian National Co., for Supplies & Equipment
98	Sarmad Company for Trading
99	Meteor Ocean Est.
100	Horizon Orbit Est. for INFTEC
101	J.ALJASSIM Electronics Est.
102	Est. of Dawood Al-Nazer
103	Hattan Ahmed Turki Est.
104	Optimal Technology Solutions
105	Holool Company Limited
106	MobiZone Saudi Co.
107	Integrators MEA

108	RAMOOZ
109	Al-Bilad Arabia Company Limited (ABA)
110	Arabic Computer Systems Limited
111	Hussein Omar Balubaid Trading Establishment
112	Alarabi Establishment for Communication Devices
113	Saudi Axiom Telecom Company
114	Electronic Horizons Telecom Est.
115	Integrated Opinion Est.
116	Al-Elm Information Security
117	Art Vision Est.
118	Rekas Company for Trade
119	Aseer Est. for Press & Publishing
120	Technology Touches Co.
121	Digital Zadcom for Computer Services (Zad Group)
122	iTelgent Company
123	Al-Tekania for Contracting and Trading Co.
124	Al-Mozoon Telecom Company (AMT)
125	Okaz Establishment for Journalism and Publishing
126	Commerce Investment Technology Company
127	Tim We Saudi Arabia
128	True for Trading & Marketing Ltd.
129	Technology Development Est.
130	Etesal Communication Co.
131	Asaig United for Communications
132	Innovative Solutions
133	Yadem for Telecommunication Est.
134	ERTIQA Information Est.
135	Smart Message Telecom Technical Est.

#### License Type: Audio Text Services (700) (24 Licenses)

1	Mawarid Electronics Company Ltd.
2	Electronic Group Holding Company
3	Saudi Trading & Resources Co. Ltd.
4	Mubasher International Company (affiliate of NTG)
5	Alwataniya Advertising Company
6	Mobile Innovative Solutions Company
7	Systems of Strategic Business Solutions (SSBS) (Al-Othman Group)
8	Saudi Pearl Company
9	Sky Telecommunications Ltd.
10	Arabs Call Company Limited
11	Advertising Services Company
12	SOLEX Plus
13	SAB Communications
14	Electronic Concepts Company Ltd.
15	Smart Call Co.
16	Advanced Telecommunications Company (ATC)
17	Mediacall Company Ltd.
18	iColPlus Company Ltd.
19	Interkey Company for Communication and Computer
20	MOBILINK Company
21	Unique Business Group Arabia (UBG)
22	MobiZone Saudi Co.
23	Voice & Data Telecommunication Company
24	First Gulf Contracting Company Ltd.

#### License Type: Call Center Services (10 Licenses)

1	RMZ Commercial Co.
2	Zajoul for Advanced Communication Technology

3	Al-Khaleej for Training and Education Limited
4	Branch of Saraya AlJazirah Telecommunication & Technology Est.
5	Sanabis Communication Technology, Training & Development
6	Perfect Presentation Company
7	Sara Telecom
8	SOLEX Plus
9	Electronic Group Holding Company
10	Uni BHR Telecom

License Type: Telecom Hotels (3 Licenses)	
1	Electronia Company
2	Nour Communications Company (NourNet)
3	Interkey Company for Communication and Computer

License Type: Electronic Wallet Services (5 Licenses)	
1	E - Pay Telecom Company Ltd
2	One Card
3	Zafa Company Limited
4	Perfect Presentation Company
5	Nomd Company

License Type: Prepaid Card Recharging Services (4 License)	
1	Intelligent Marketing Company
2	Integrated Telecom Technologies
3	Uni BHR Telecom
4	One Card

License Type: Network Operation Center (NOC) (3 Licenses)	
1	Integrated Networks LLC
2	Detecon Al Saudia Co. Ltd. (DETASAD)
3	International Electronic Telecommunications Company (Inteltec Saudi Arabia)

License Type: Interactive Voice Message Broadcasting (1 Licenses)	
1	Gulf Link IT

## Appendix (F): CITC Web Sites

Main CITC site:

<http://www.citc.gov.sa>



CITC intranet site:

<http://my>



The National Center for Information Security (CERT-SA):

<http://www.cert.gov.sa>



Saudi Internet Service Portal:

<http://www.internet.gov.sa>



Saudi Network Information Center:

<http://www.nic.net.sa>



IPv6 Task Force:

<http://www.ipv6.org.sa>



Saudi National Anti-SPAM Program:

<http://www.SPAM.gov.sa>



National Committee for Information Society (under development):

<http://www.ncis.org.sa>



## Appendix (G): CITC Financial Accounts

	31 Dec 2007 (Audited) SR (000)	31 Dec 2008 (not Audited) SR (000)
<b>Revenues</b>		
Commercial Services Provisioning Fees	4,607,092	5,012,084
License Fees	349,576	23,299,960*
Spectrum Usage Fees	2,109,663	825,652
Other Revenues	23,689	23,571
<b>Total Revenues</b>	<b>7,090,020</b>	<b>29,161,267</b>
<b>Expenditures</b>		
Employee Costs	105,979	109,274
Administrative and General Expenditures	30,827	41,443
Consultancy	24,431	19,532
IT Systems and Software	17,428	5,817
Capital Expenditures	72,553	122,828
<b>Total Expenditures</b>	<b>251,218</b>	<b>298,894</b>
<b>NET REVENUES</b>	<b>6,838,802</b>	<b>28,862,373</b>

**Note:** (\*) The substantial jump in license fee revenues for the fiscal year 2008 is due to the collection of the third mobile license fee paid by Saudi Zain, valued at 22.9 billion SAR (non-recurring fee).

## Appendix (H): Excerpts from the CITC Staff Code of Conduct

- Respect the rights of all stakeholders who interact with the CITC and deal with them courteously, fairly and impartially.
- Refrain from any actions, dealings or work activities which are considered improper or are seen as inconsistent with moral and honorable conduct.
- Do not accept or request any gifts, compensation, invitations or other benefits of any kind from parties who have a direct or indirect business relationship with the CITC.
- Do not directly or indirectly exploit your position at CITC for personal advantage or profit or for the benefit of a relative or a friend.
- Refrain from any activity that can lead to conflict of interest, real or perceived, between your own personal interests on the one hand and professional responsibilities on the other. In the case where such conflict exists or may exist or if you are subjected to conflicting external pressures or if in doubt of the proper course of action, refer the issue, in confidence, directly and in writing to the immediate supervisor.
- Refrain from any action that might lead to preferential treatment of persons or entities involved with the CITC, or might negatively impact CITC's reputation.
- Avoid establishing personal working relationships with people, establishments or companies whose self interest is linked to CITC decisions and refrain from offering advice or revealing information which is not publicly available and which might provide unfair advantage to any party.
- Do not reveal confidential information obtained during the exercise of duties whether verbally, in writing or electronically.
- Do not, either directly or indirectly, exploit or utilize information which is obtained during the course of employment at the CITC and which is not publicly available, for personal gains or for the benefit or harm of others.
- Do not get involved in any business or undertake any independent work activities of a similar nature to that of the CITC's. To be involved in any other business activity, which is not of a similar nature to that of the CITC, a prior approval must be obtained from the Governor.



هيئة الاتصالات وتقنية المعلومات  
Communications and Information Technology Commission



هيئة الاتصالات وتقنية المعلومات  
Communications and Information Technology Commission



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