



# **National DigiContent Strategy for Saudi Arabia**

*Symposium – Benchmark Presentation*

**Riyadh**

October 12<sup>th</sup>, 2009

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## Arabic Digital Content Challenges & Opportunities

TOP TEN LANGUAGES IN THE INTERNET	Internet Users by Language	Internet Penetration by Language	Growth in Internet ( 2000 - 2008 )	Internet Users % of Total	World Population for this Language (2008 Estimate)
<u>English</u>	463,790,410	37.2 %	226.7 %	29.1 %	1,247,862,351
<u>Chinese</u>	321,361,613	23.5 %	894.8 %	20.1 %	1,365,138,028
<u>Spanish</u>	130,775,144	32.0 %	619.3 %	8.2 %	408,760,807
<u>Japanese</u>	94,000,000	73.8 %	99.7 %	5.9 %	127,288,419
<u>French</u>	73,609,362	17.8 %	503.4 %	4.6 %	414,043,695
<u>Portuguese</u>	72,555,800	29.7 %	857.7 %	4.5 %	244,080,690
<u>German</u>	65,243,673	67.7 %	135.5 %	4.1 %	96,402,666
<b>Arabic</b>	<b>41,396,600</b>	<b>14.2 %</b>	<b>1,545.2 %</b>	<b>2.6 %</b>	<b>291,073,346</b>
<u>Russian</u>	38,000,000	27.0 %	1,125.8 %	2.4 %	140,702,094
<u>Korean</u>	36,794,800	51.9 %	93.3 %	2.3 %	70,944,739
<b>TOP 10 LANGUAGES</b>	<b>1,337,527,402</b>	<b>30.4 %</b>	<b>329.2 %</b>	<b>83.8 %</b>	<b>4,406,296,835</b>
Rest of the Languages	258,742,706	11.2 %	424.5 %	16.2 %	2,303,732,235
<b>WORLD TOTAL</b>	<b>1,596,270,108</b>	<b>23.8 %</b>	<b>342.2 %</b>	<b>100.0 %</b>	<b>6,710,029,070</b>

Source: InternetWorldStats.com

## National DigiContent Strategy: Project Objectives

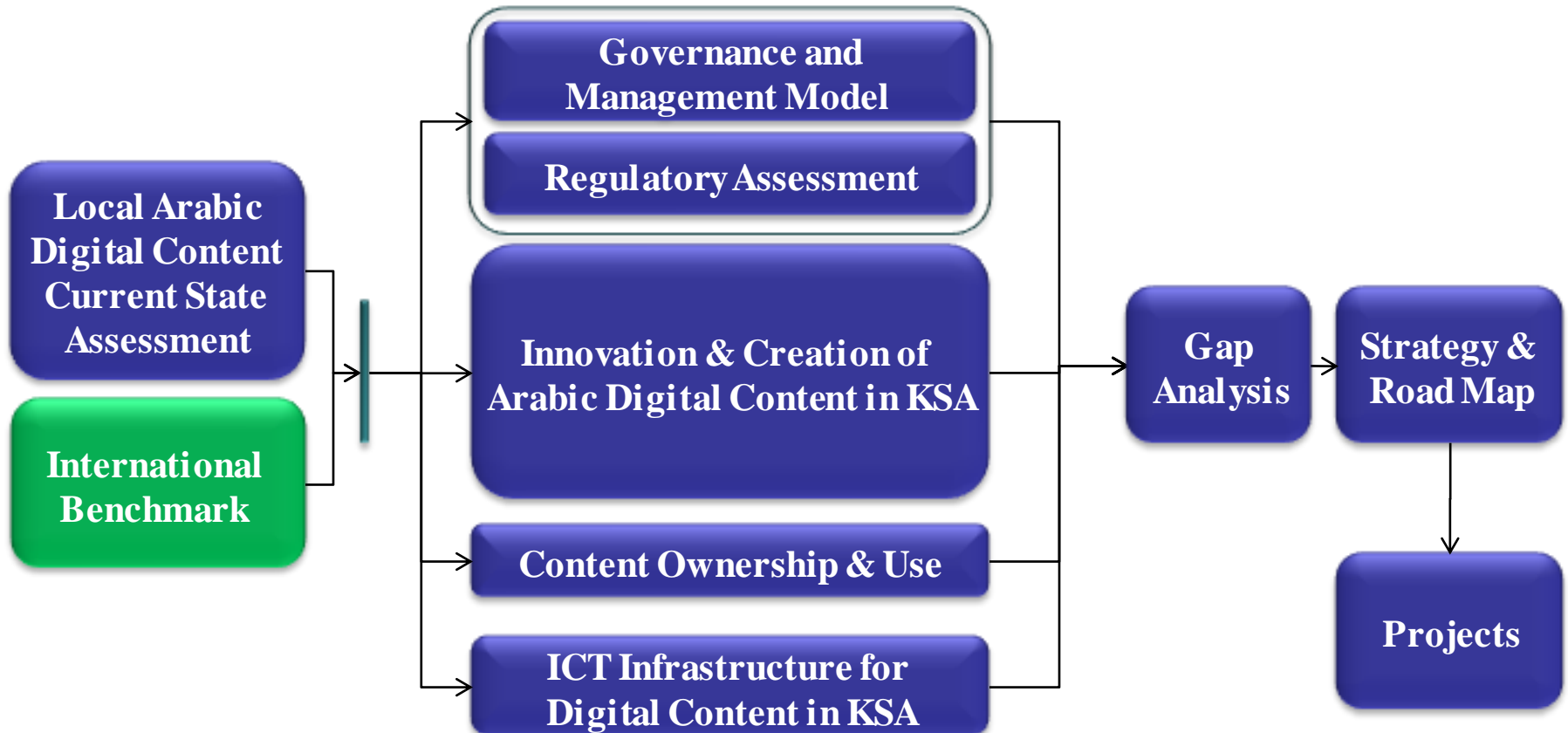
- Assess current Digital Content Industry in Saudi Arabia and worldwide
- Develop benchmarks by examining digital content development in different countries
- Analyze regulations, governance and management models for digital content globally
- Establish National Strategic Plan & Roadmap for Arabic Content complete with list of proposed projects



## King Abdullah Initiative for Digital Content Current Projects



## Project Scope



## Benchmark Approach

- **Objective**
  - Identify best practices to accelerate growth of digital content
- **Methodology**
  - Select benchmark countries based on criteria for:
    - Demographics
    - Maturity of digital content and ICT markets
    - ICT infrastructure
  - Collect best practices based upon analysis of countries benchmarked
  - Input best practices into National Strategy development



## Selection Criteria

### Best-in-Class Countries

- Broadband and Internet penetration
- Existence of Digital Content Initiatives
- Number of National Domain Names

### Fast Developing Countries

- Growth rates of Internet users
- Growth rates of national Domain Names
- % of population under 25 years old

## Broadband Penetration

Best-in-Class Countries	Broadband Penetration (Total fixed broadband Internet subscribers per 100 population   2008)
Denmark	36.8
Norway	34.0
South Korea	33.0
Canada	32.0
USA	25.6
<b>Saudi Arabia</b>	<b>5.4</b>

- Canada:** The incumbent Telecom Operators have faced competition from the cable TV industry: Canadian broadband market is remarkable because the ratio of DSL to cable modems is close to 50-50
- Korea:** In February 2009, the Korea Communications Commission (KCC) announced plans to upgrade the national network to offer 1 Gbps service by 2012. Currently, Koreans can get speeds up to 100 Mbps. The plan will cost 34.1 trillion won (\$24.6 billion) over the next five years (5% from Korean Central Government and the remaining from private operators).
- USA:** FCC organized competition to Incumbent Telecom by TV Cable Operators. In addition the Broadband Technology Opportunity Program (BTOP) funded at \$4.7 billion, will provide grants to support the deployment of broadband infrastructure in unserved and underserved areas. BTOP is part of the American Recovery and Reinvestment Act of 2009 which was signed into law on February 17, 2009.

Source: World Economic Forum, CITC

## Internet Usage

Best-in-Class Countries	Internet Usage (Estimated Internet users per 100 population   2008)
Norway	85
Denmark	84.9
UK	79.9
South Korea	77.4
Switzerland	76.4
Germany	75.7
Canada	73.0
USA	71.2
Singapore	70.0
<b>Malaysia</b>	<b>62.5</b>
<b>Saudi Arabia</b>	<b>31</b>

Source: World Economic Forum, CITC

## Top ccTLD Registries by Domain Name Base

Countries	Population (Estimate 2009)	ccTLD	Number of ccTLDs (Q3 2009)
Germany	82,369,552	.de	12,990,476
China	1,330,044,544	.cn	12,545,589
UK	60,943,912	.uk	7,904,894
Netherlands	16,645,313	.nl	3,544,465
Russian Federation	140,702,096	.ru	2,389,881
Argentina	40,482,000	.ar	
Italy	58,145,320	.it	
Brazil	178,470,000	.br	
USA	303,824,640	.us	

Source: CIA WorldFactbook, Verisign

## Digital Content Initiatives (1/2)

Best-in-Class Countries	Presence of National Strategy for Digital Content, Digital Libraries, Digital Culture Projects
Canada	<p><b>Government of Canada Web Archive</b> was developed by Library &amp; Archives Canada Act in 2004, and now includes electronic publications and maps.</p> <p><b>Synergies Project</b> is building a <b>national platform</b> with a wide range of tools to support the creation, distribution, access and archiving of digital journal articles in the Social Sciences and Humanities.</p>
UK	<p><b>19th Century British Library Newspapers:</b> Phase 1 of project digitized over 2,000,000 pages of content, providing free access to a virtual library of nationally, regionally and locally important digitized British newspapers from 1800 to 1900.</p> <p><b>British Library Archival Sound Recordings:</b> Phase 1 of project digitized more than 12,000 items totaling 3,900 hours of segmented recordings</p>

## Digital Content Initiatives (2/2)

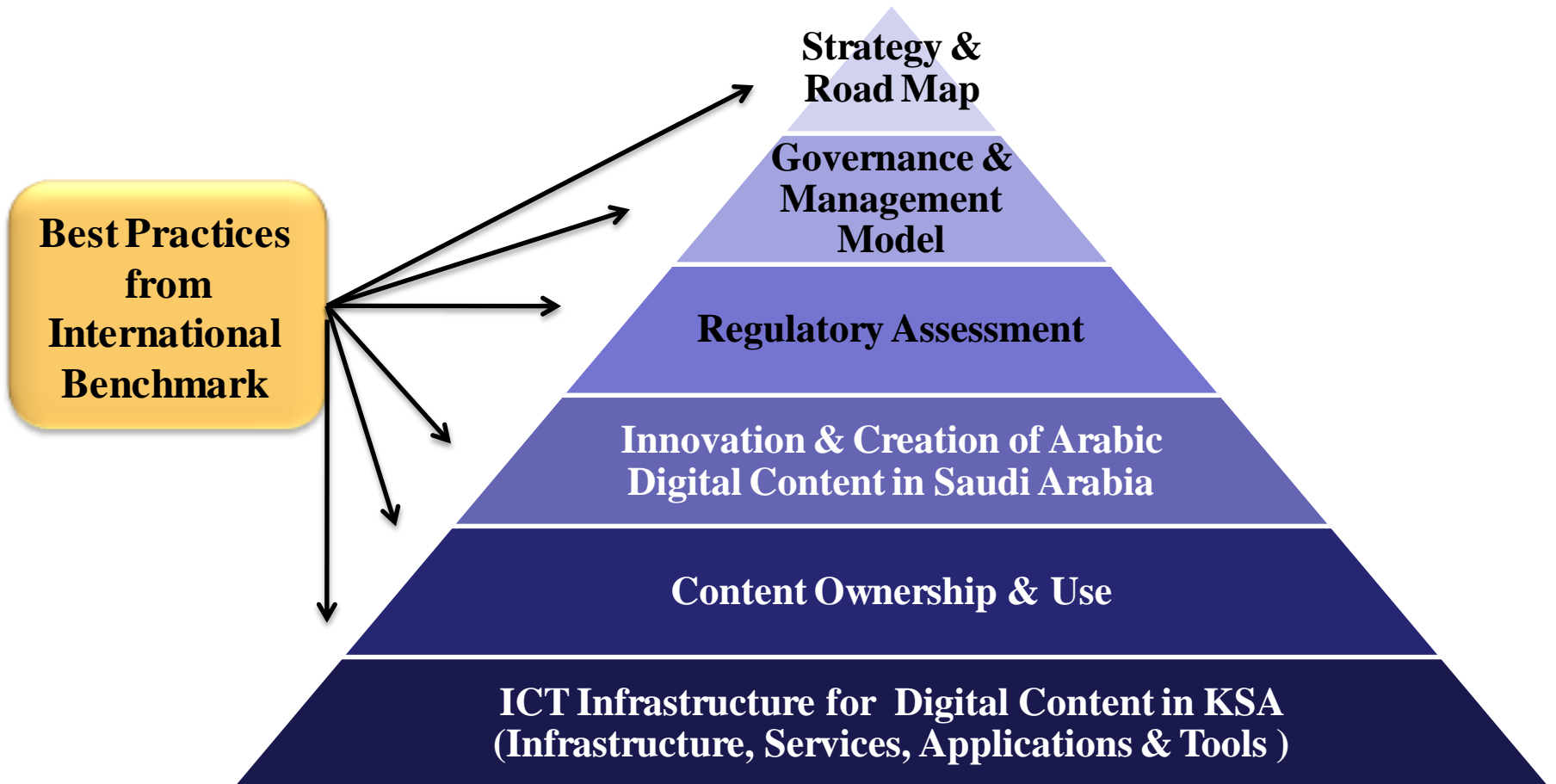
Best-in-Class Countries	Presence of National Strategy for Digital Content, Digital Libraries, Digital Culture Projects
USA	<b>National Digital Information Infrastructure &amp; Preservation Program:</b> national strategy launched at the Library of Congress to collect, preserve and make available digital content
EU	<b>Europeana</b> is a search platform to a collection of European digital libraries with digitized paintings, books, films and archives. The project was initiated by the European Commission. 4.6 million digital items.
Norway	<b>Norwegian Digital Library:</b> 5-year national initiative program, under the aegis of the Norwegian Archive, Library and Museum Authority. <b>Digital Norway:</b> geographic information online, coordination of all geographic information that is established by public and private sources
Australia	<b>Digital Regions Initiative:</b> The Australian Government has provided \$60 million over four years (starting in 2009) to co-fund digital enablement projects supporting education, health & emergency services in regional, rural and remote communities.

## Internet User Growth

Fast Growing Countries	Internet User Growth (Between 2005 and 2009)
China	+ 220.3 %
Brazil	+ 149.3 %
India	+55.0 %
<b>Saudi Arabia</b>	<b>+ 256.7 %</b>

- **China**: By end of 2007, 400,000 e-books were published in China, which becomes the world's biggest single-language electronic libraries. China has a very high proactive policy in IPv6 (e.g. NREN, development of advanced IPv6 router in 2004)
- **Brazil**: Brazil's national and local governments announced plans in Jan. 2009 to expand their own digital inclusion programs: 55,000 urban public schools will be wired with broadband by late 2009.

## National DigiContent Strategy for Saudi Arabia



**Thank you for your attention.**

**Questions?**