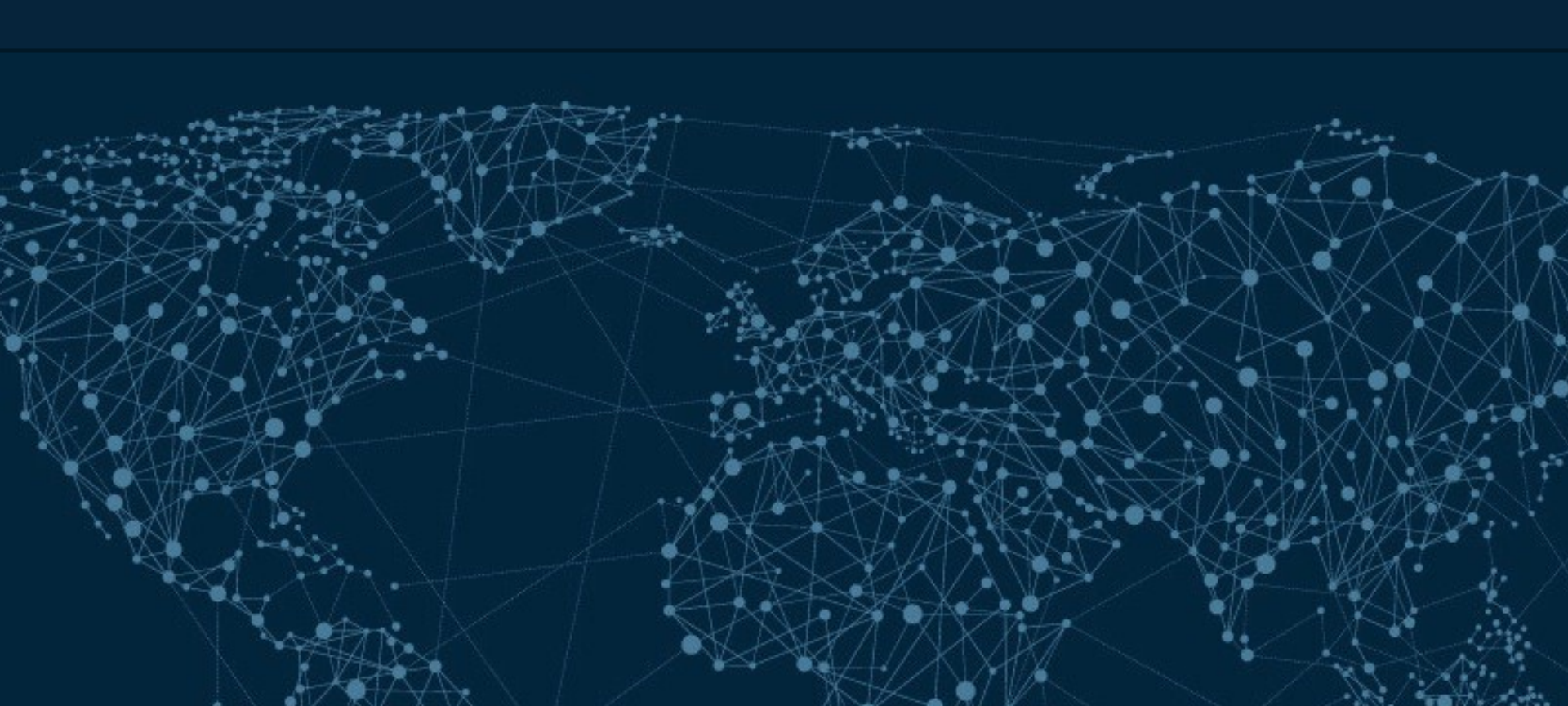# ICANN|55
MARRAKECH
5 – 10 March 2016

DNS Industry in the Middle East

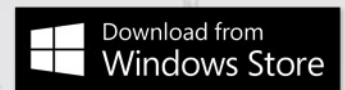ICANN 55 | Marrakech, Morocco | 8 March 2016

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Agenda

Welcome Note and Introduction

Introduction to the DNS Entrepreneurship Center (DNS-EC)

The DNS-EC Business Track

The MEAC DNS Study

Experience from a New gTLD Applicant - شبكة.

The Registrar Business in the Middle East

Your Future Starts Today

Introduction to the DNS Entrepreneurship Center
Hadia Elminiawi | ICANN Marrakech
8 March 2016

Agenda

ABOUT DNS-EC

DNS-EC CURRENT WORK

DNS-EC FUTURE WORK

Q&A

Background

As part of ICANN regional strategy to develop the domain name ecosystem in Africa and the Middle East

- DNS-EC was announced as a joint project between the National Telecommunication Regulatory Authority of Egypt (NTRA) and ICANN

- MOU signed during ICANN London meeting – June 2014

Vision

Become the hub and incubator of the next generation of the DNS entrepreneurs in the region

Mission

Develop a robust and healthy domain name ecosystem in Africa and the Middle East and act as a repository for the industry in the Region

DNS-EC aims to

- Develop a network of stakeholders, decision makers and experts that can contribute to ICANN's policies and decision making

- Build a robust and competitive DNS market in the region

- Foster collaboration among TLD operators and sharing of best practices

- Encourage entrepreneurs to engage in the domain name business

- Partner with industry leaders

DNS-EC CURRENT WORK

factors that affect the domain name in the region

According to the DNS Study conducted by EURid for the Middle East and Adjoining Countries

- Policies

- Prices

- Operation costs & staffing

- Technical infrastructure

- Marketing

Develop the domain name ecosystem

- Registries (Service Providers & Operators)

- Registrars

- Businesses interested in the domain name industry

DNS-EC helps Registries

- **Build** capacity and expertise

- **Develop** their business plans

- **Market** their TLDs

- **Develop** necessary and relevant policies

Effect on the industry

- Sustainable growth in TLD registrations
- Encourage international registrars to enter the local market
- Create a competitive local market, leading eventually to lower prices
- Help build a network of experts that can participate in ICANN's policies & serve as a steering wheel to the development of the domain name industry

DNS-EC helps registrars

- Develop Capacities and local expertise in all aspects of operation

- Encourage registrars to develop resellers packages

- Help registrars that are interested in becoming ICANN accredited

Effect on the industry

- Create a competitive and robust DNS market

- Increase registrations

- Build end users confidence

- Help build a registrar network that can contribute to ICANN's bottom-up multistakeholder Model

DNS-EC Helps interested businesses

- Encourage young entrepreneurs to enter the market

- Raise awareness about ICANN's Community at work

- Help potential gTLD Registry applicants to stay informed about future rounds of new gTLD applications and opportunities

Effect on the industry

- Introduce new players, leading to a healthy and competitive market

- Create a network from the Internet commercial sector that can take part in ICANN's policy making and decision

- Grow the domain name market in the region

Workshops

- DNS Business Development - April, 2015

- Registry Best Practices – April, 2015

- Train the Trainer – June, 2015

- DNS Operation & DNSSEC - July, 2015

- Legal workshop – January, 2016

Workshops

SWOT Workshops for national DNS Markets

- Tunis, Tunisia – October, 2015

- Doha, Qatar – October, 2015

- Muscat, Oman – February, 2016

- UAE, Dubai - February 2016

Workshops

DNS-EC FUTURE WORK

Looking Ahead

- Continue to build capacity and expertise through out the region

- Continue to raise awareness about the domain name industry, targeting new businesses and new potential decision makers from the region

Looking Ahead

- Raise awareness about IDNs

- Seek Partnerships

- Provide Consultancy

Questions

Thank You!
Email: info@dns-ec.eg
Website: http://www.dns-ec.eg

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DNS Entrepreneurship Center

DNS_EC

DNS-Entreprenurship Center Update

ICANN-Marrakech March, 2016 Meeting

Thomas Barrett

EnCirca, Inc

DNS-EC Business Track

New DNS-EC Activities Since Last Report
- *SWOT Workshop for National DNS Markets*
  - Muscat, Oman – February, 2016
  - Dubai, UAE – February, 2016

Past DNS-EC Activities
- *SWOT Workshop for National DNS Markets (with Stephane Van Gelder)*
  - Tunis, Tunisia – October, 2015
  - Doha, Qatar – October, 2015

- *DNS-EC - Cairo, Egypt (with Michele Neylon)*
  - DNS Business Development Workshop – March, 2015

SWOT Workshop for National DNS Markets
Instructor: Tom Barrett

Day 1
- The Impact of new gTLDs
- ccTLD Registry Overview
- SWOT Brainstorming
- Group Presentations
- TLD Case Study - .BUZZ
- Consolidate
- Prioritize

Day 2
- TLD Case Study - .ME
- Introduction to TOWS
- TOWS Brainstorming
- Group Presentations
- Consolidate
- Prioritize
- Debrief and Next Steps

What is SWOT?

- Strengths (internal)

- Weaknesses (internal)

- Opportunities (external)

- Threats (external)

"TOWS"

Example of SWOT Analysis

Threats	Opportunities
•High international competition •Lack of awareness •High leased line cost •Low price of .com	•Lots of available names •Similarity of .om vs .com •Add international registrars •Government drive for E-commerce
Strengths	**Weaknesses**
•Local identity •Available domain names •Security and protection	•Closed policy •High cost vs .com •Lack of one stop shop •Financial limitation

What is the TOWS Process?

- Strengths and Opportunities (SO)
  - How can you use your strengths to take advantage of the opportunities?

- Strengths and Threats (ST)
  - How can you take advantage of your strengths to avoid real and potential threats

- Weaknesses and Opportunities (WO)
  - How can you use your opportunities to overcome the weaknesses you are experiencing?

- Weaknesses and Threats (WT)
  - How can you minimize your weaknesses and avoid threats?

TOWS Matrix

TOWS Strategic Alternatives Matrix

	External Opportunities (O) 1. 2. 3. 4.	External Threats (T) 1. 2. 3. 4.
Internal Strengths (S) 1. 2. 3. 4.	**SO** *"Maxi-Maxi" Strategy* Strategies that **use strengths** to **maximize opportunities**.	**ST** *"Maxi-Mini" Strategy* Strategies that **use strengths** to **minimize threats**.
Internal Weaknesses (W) 1. 2. 3. 4.	**WO** *"Mini-Maxi" Strategy* Strategies that **minimize weaknesses** by **taking advantage of opportunities**.	**WT** *"Mini-Mini" Strategy* Strategies that **minimize weaknesses** and **avoid threats**.

Example of TOWS Analysis

| ST	SO
•Use local identity and branding to overcome lack awareness •Security and protection will encovrage .om prices •Target local SME's and personal individual by creating campaigns such as social media, online ads	•Use local identity and available domains in government drive for e-commerce •Use the availability and similarity of domain names to target .com domains owners to register .om •Use security and protection features to promote e-commerce in Oman which in turn will increase local domain registration
WT	**WO**
•Flexible registration to encourage registration •Work with registrars to design promo campaign •Use one stop shop to compensate for high price of .com •Promotions for the market to be able to raise money for .om initiatives and increasing awareness •Accredit international registrars and add more players to increase the competition	•Relax existing policies to increase local and international registrars and reduce cost •Create one stop shop by adding more registrars •Promote local e-commerce, websites, Apps, in order to take advantage of domain names available locally. •Use the similarity if .om/.com to generate more revenue to decrease the financial limitations.

Observations & Opportunities

- Observations
  - ccTLD Registries Need to engage with their channel
  - Government agencies need a more commercial "For-Profit" mindset
    - Engage their distribution channel
    - Branding and marketing
  - Not enough attention focused on data analytics
    - Market and competitive analysis
    - Channel recruitment and engagement
    - TLD Awareness and Branding
- Opportunities
  - Tie-in with country's national brand
  - Tie-in with economic growth and STEM Education (Science-Technology-Engineering-Math)
  - Analytical reports on DNS Usage
    - ccTLD vs. .COM vs. geo-name (.ME, etc.) market share
    - Registrant segmentation: How are domains being used?

DNS Study for the Middle East and Adjoining Countries

Outcomes – Marrakech, March 2016
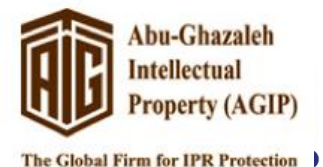
WEBSITES
IN THE
REGION

English dominates as the language of web content in the region.

71% English

55% Globally

The region has a full range of web content – news, entertainment, educational, retail, governmental and blogs

---

INTERNET
INFRASTRUCTURE
AND USAGE

■ Some countries in the region struggle with basic Internet infrastructure

31% of users in the region spend **3 hours** or fewer per day online

■ Internet literacy is still low because of sociological, cultural and political factors

---

HOSTING

■ The market for hosting services in the region is weak.

5% of the region's popular sites are hosted locally

■ Legislation and regulation can affect users' choice of hosting country

EUR*id*
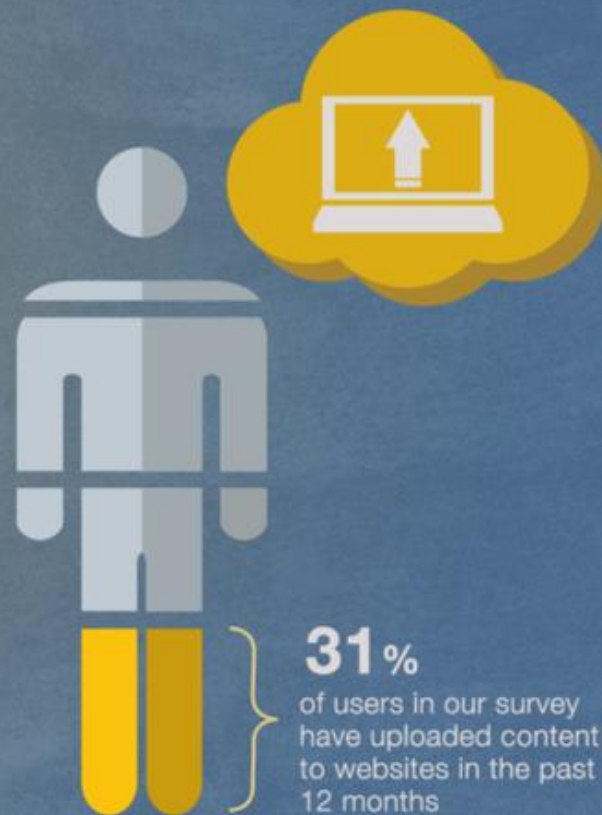
LANGUAGE
AND
CONTENT

English and French remain key languages for a large part of the population

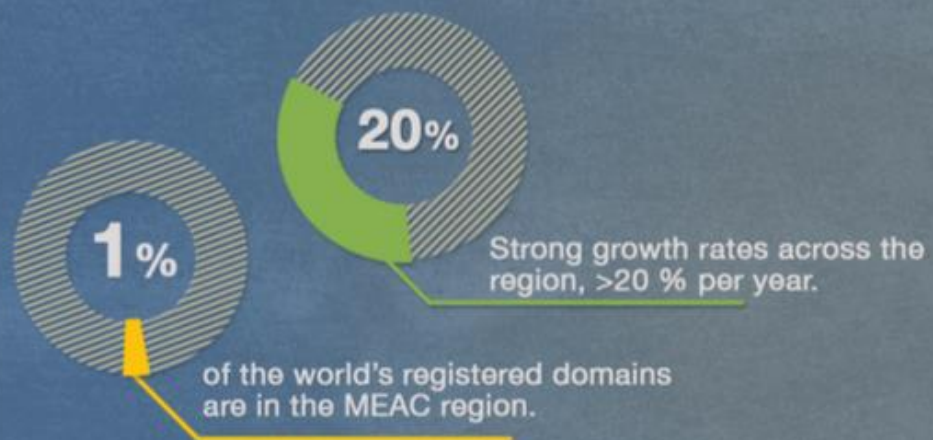Users switch language online, according to context

Strong preference for using local languages (eg Arabic, Farsi, Urdu) when interacting with friends and government

Websites are preferred to social media when interacting with business and governments

31% of users in our survey have uploaded content to websites in the past 12 months

EURid

DOMAINS

There are **2.9 million** domain names associated with the region in 2015.

20%

1%

Strong growth rates across the region, >20 % per year.

of the world's registered domains are in the MEAC region.

21000 IDNs across the region, of which half are under .tr (Turkey – Latin script).

Users from the region are more likely to do direct navigation than are global users.

Nearly all users check the domain name before clicking on search results.

REGISTRIES

- Domain name penetration throughout the region is low. Only **3 ccTLDs** in the region have higher than **10 domains** per 1 000 inhabitants. Comparator countries have between **100 - 300** domains per **1 000**.

- Most ccTLDs in the region remain confined to their territory with strict and/or complex policies and procedures both for registrar accreditation and for domain name registration.

- Historical facts that resulted in the delegation or redelegation of the registry operator are still influencing ta healthy registry development

- There is clear lack of consistent and regular registry involvement in the international TLD environment, including the regional TLD organisations, which are the cradle of best practices.

EURid

REGISTRAR MARKET

REGISTRANT MARKET

Competition in local registrar markets is weak, resulting in poor choice and pricing for end users.

Local registrars often complain about the lack of dialogue with the registry that remains impassive to the request for modernising the TLD management.

Most of the international registrars who have modern platforms for end-users are not present in the region. They are discouraged to include the region TLDs in their worldwide registration platforms because of the administrative barriers to register domain names.t/requirements in local ccTLDs deter international registrars from participating in the markets.

Domain names compete with much faster channels to be online such as social media.

Users complain about lack of local providers.

Most users couldn't name their registrar.

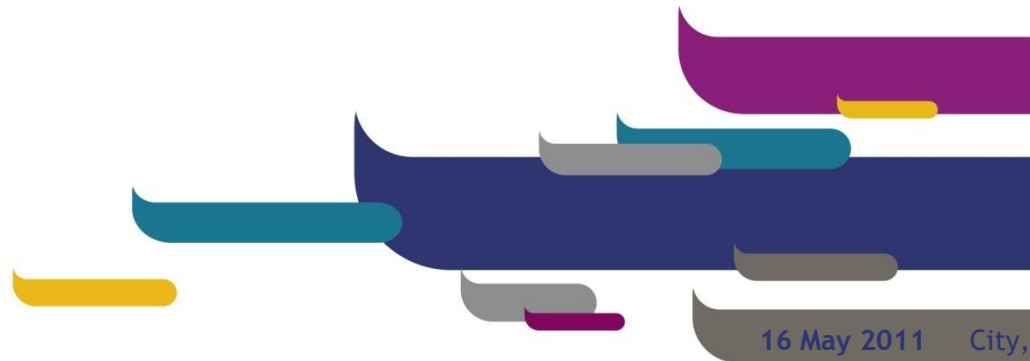Most users said they didn't buy value add services when buying their domain.

Choice of payment systems for registering domains is limited, and does not include innovative services for the unbanked.

EURid

Recommendations – domain name market

- Room for diversity in business models and registry structure
- Local operators need to set clear strategy, measurable goals
- Liberalising policies can drive growth, but a sustained approach is needed
- Registrar relationships are key, including with international registrars
- Participation in regional ccTLD organisations or DNS centres can benefit emerging registries

.eu
Your European Identity

Questions?

Experience from a New gTLD Applicant - شبكة.

The Registrar Business in the Middle East
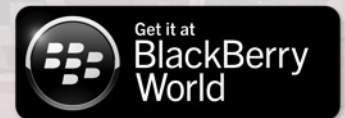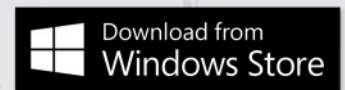
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