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1. Introduction

Native Language Internet Address (NLIA) project has started in Turkey in almost a year ago. After the NLIA success in its home base, Korea, this was the first full scale international implementation. The fact that Turkish alphabet uses latin characters, contrary to Korean non-latin alphabet, gave us the chance to test the business case and fundamentals of the NLIA proposition.

This short article, following a brief introduction to the country's demographics, aims to elaborate on the Turkish NLIA project, market reaction it received and the critical success factors.

2. Demographics

- a. Turkey's population is over 70.4 million with the annual growth rate being 1.06%¹. The breakdown of the population by age groups is as follows:
 - i. 0-14 years: 25.5% (49% female),
 - ii. 15-64 years: 67.7% (49% female),
 - iii. 65 years and over: 6.8% (54% female).
- b. The 2005 estimate for the GDP (purchasing power parity) is \$552.7 billion¹; accordingly, the GDP per capita is \$7,900. Its composition by sectors is as follows:
 - i. Services: 58.5%,
 - ii. Industry 29.8%,
 - iii. Agriculture 11.7%.

- c. Turkish is the official language of the country. Among the secondary languages English comes first by 15% followed by Kurdish with 5%².
- d. Turkish alphabet comprises of the 22 characters from the English alphabet (excluded characters are qQ, xX and wW) and the 7 additional Turkish characters (çÇ, ğĞ, ıİ, iİ, öÖ, şŞ and üÜ).
- e. Market brief ³
 - i. There are more than 58 million telephone subscribers; the subscribers from the three GSM operators account for 67% of the total.
 - ii. It is estimated that there are around 5 million personal computers in use today.
 - iii. The ADSL broadband technology was introduced only two years ago. The current number of subscribers has exceeded 1.85 million and growing strongly.
 - iv. Of all the households, only 8.7% of them has some kind of internet connection. Only 2% of the households are connected to internet using broadband technology.
 - v. Currently, there are more than 10 million internet users in Turkey. The breakdown of their internet access points is as follows (some connect from more than one location):
 - 1. 52% from workplace,
 - 2. 37% from internet cafes,
 - 3. 11% from homes.
 - vi. The domain name market in Turkey is quite significant. There are more than 333,000 gTLD's and more than 85,000 ccTLD's registered from Turkey. The aggregate annual growth of the domain name market is around 40%.

3. Turkish NLIA project

Netpia Turkey was established at the end of April 2005, during the 12th anniversary of internet in Turkey. Following the company setup, procurements and team building, the initial project development and localizations continued until August 2005. The development was carried on all along throughout the different phases of the project and after in order to prepare for the subsequent phases and develop all the complementary products and services required.

In August, a Test operation was initiated. The objective was to let public in general have a feeling about the NLIA service, use the provisional linkings provided and test out temporary registrations. It was met by a high level of interest by many people around the country. As previously announced, at the end of the test period, the

temporary registrations and linkings were removed from the database. In retrospect, allowing people to do temporary registrations, when there is not enough awareness of the system and its project phases, had created some confusion that became apparent at later stages. Having only the provisional linking to test out the system would be a better approach in this regard.

In September, Sunrise operation has started. The objective was to allow rightful owners to apply for pre-registration. Rightful owners would be government and academic institutions, companies with trade registration certificates or trademarks, people with their birth certificates, etc. As there were no precedence regarding the rightful owners, the approach was "first come first served" basis. This approach has become inherent for all registrations during and after the sunrise.

After a month of accepting pre-registrations, in October, registrations has started. This new phase was an extension of the Sunrise phase since registration were done after verification and with provided documentation supporting rightful ownership. The NLIA's for all governmental and academic institutions were reserved to ensure that they point to correct addresses. The provisional linkings for government and academic institutions will continue to be provided for a certain period into the future.

The Landrush or commercial operation started recently in mid-February 2006. Now, except for governmental and academic institutions, no proof documentation is required for registrations.

The infrastructure development has been the critical activity since the beginning of the project. Server infrastructure was established by NLIA-enabling the name server software at the ISP's. As this operation is time consuming and full coverage takes rather long time, complementary client infrastructure initiative was started whereby free NLIA helper (plug-in) program was made available to public on internet and through different channels. This was followed by offering other free value-added programs such as PC-Clean (anti-spyware, anti-adware) on internet which also NLIA-enabled the PC's they were running.

The registrations has started to pick up with the growing infrastructure and with the introduction of resellers which are one of the critical components of the NLIA business.

4. Developments

- a. In April 2006, 13th anniversary of internet access in Turkey was celebrated; it was also the first anniversary for Netpia Turkey.
- b. The broadband deployment has picked-up pace with Turk Telekom's privatisation, with the introduction of ADSL resellers and with the cable deregulation.
- c. There is a new telecommunications law that is being discussed in the parliament nowadays. One of the points of discussion is the appointment of

the registrars for ccTLD domains. The objective is to have the telecommunications regulatory body to have the right transferred from the current registrar, Middle East Technical University. The current registrar has been under criticism for its poor level of service and red-tape and resulting levels of ccTLD registration. It remains to be seen how the service levels will change after the law is passed.

- d. Earlier last year, Informatics Association of Turkey has made an agreement with UNITD of The Netherlands to collaborate to sell pTLD in Turkey. The partnership was severed when the relationship between UNITD and Public Root soured. After UNITD was reorganized as UnifiedRoot, they have re-launched pTLD in Turkey recently but haven't made much inroads yet. The Informatics Association of Turkey came under criticism for this partnership as they were a sectoral NGO. The efforts also created a confusion in the market as pTLD was initially promoted as Turkish Domain Name when the IDN support was not available.
- e. IDN never really had a good reception in Turkey. There are no local registrars but continuous opportunist attempts to sell IDN by different smaller companies. The success of the client strategy of NLIA in Turkey, has recently encouraged some IDN selling companies to come forward once again with plug-in solutions.

On the other hand, there was a more profound IDN initiative developed by the Near East University of Northern Cyprus. They developed a name server solution, I-DNS, back in 2001 and were offering a scheme to resolve IDN's with Turkish characters correctly. They were also represented at ICANN's IDN consultation sessions at the time. Unfortunately the project didn't get much attention in the internet community and was not commercialized.

With insufficient information and lots of prejudice, having claims in the market for Turkish Domain Names, alongside Turkish Internet Address (NLIA) have created a lot of confusion in the market. It required continuous targeted PR efforts to clarify the issues and to better explain what NLIA does and its benefits.

From another perspective, the convenience certain search engines provided to locate web sites given its related keywords, has created numerous arguments in general public. The fact that it couldn't be defined as a consistent service across browsers and time, and the fact that it might be dependent on internet usage habits which might also be influenced, usually skipped from general discussions in public.

Consequently, the NLIA concept, with its features and benefits, the philosophy behind it, the potential outcome have to be made clear in public. This takes a lot of effort and is an on-going exercise.

5. NLIA brief

- a. NLIA is not a domain name; it is a 1-to-1 mapping service with a bottom-up resolution approach.
- b. NLIA is not a search engine, it is a keyword lookup service that requires no intermediate interfaces such as a search engine to get to a web site, with a direct entry from the address bar.
- c. NLIA provides true multilingual representation of characters with UTF-8 coding.
- d. NLIA allows for the local governance of the address space.
- e. NLIA provides global integration in a peer-to-peer federation of countries, as opposed to the hierarchical structure of the DNS system.
- f. By preserving the local language it helps preserving the local culture, as well.
- g. The fundamental principle is to embrace the non-users of internet by providing easier access in people's own languages. Eliminating the language barrier and facilitating easier access could be a significant contribution in bridging the digital divide.
- h. Increased internet activity results in vitalizing e-commerce and e-government efforts.

6. Critical success factors

- a. Server infrastructure and complementary client infrastructure are the most critical success factors. As the server infrastructure development takes time it is crucial for client infrastructure be developed as an alternative, as well alongside.
- b. Quality of service is crucial for users to have a satisfactory experience with the service. The most effective promotion as usual is the word of mouth. The quality of service should be improved at different fronts:
 - i. Dynamic, functional and informative web site;
 - ii. Service to offer for unregistered NLIA (landing page);
 - iii. Easy and quick registration procedure;
 - iv. Complementary services to enhance the registration process and user experience such as wish lists, shopping baskets, waiting lists, self service, etc.
 - v. Help desk is essential to respond to user inquiries in voice as well as e-mail.
 - vi. Providing multiple payment methods is important as there might be a reluctance to use credit cards for e-commerce on the internet. Facilities such as wireline transfer, prepaid credits, etc are useful.

- c. Database work
 - i. Certain keywords need to be reserved
 - 1. For use of government and academic institutions;
 - 2. To disallow usage of certain keywords such as offensive words.
 - ii. Provisional linking is required
 - 1. During sunrise for popular sites;
 - 2. During commercial operation for government and academic institutions.
- d. Promotion of the concept to create awareness and to boost registrations is crucial. Numerous media channels such as newspapers, magazines, internet and television were used mostly for interviews and press releases.

Internet was the primary advertisement channel, however recently newspaper advertisements are also being considered.

As part of the awareness creation campaign visits are being organized across the country to cities where there is high level of commercial activity, to visit local government offices, local media, professional associations, universities, etc.

Various customers, partners, governmental institutes and NGO's have started displaying their NLIA as banners on their websites simply to announce their new addresses people can use to access their sites. This also creates a word-of-mouth promotion which is most effective.

7. Going forward

Going forward, there are a few key requirements to achieve a seamless service:

- a. Establishing a Dispute Resolution Committee external to and independent from Netpia, to improve on the current policy based on the local legislation. This would bring in a new internet and business perspective to the issues as well as speed up the process.
- b. Establishing a Consultation Committee to consult on matters regarding generic words and new policies.
- c. As NLIA does provide more local governance to manage the (local) address space, it is critical to involve relevant parties in these committees. Possible stakeholders in this regard would be consumer rights groups, regulatory authorities, universities, patent lawyers, trade and industry chambers, etc.

References

¹ CIA Factbook, 2006

² TNS PIAR Survey, 2005

³ Turk.internet.com, Türk Telekom, Turkish Statistical Institute, Webhosting.info, NIC.tr