Governance of ccTLD and geoTLD
within the Business Model Paradigm

dotDUCKY

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About dotDUCKY project

dotDUCKY is a non-profit independent project established in 2023 by Laura Margolis and Natalia Filina.
We are highly captivated by the domain name world and examine its processes and trends from a unique perspective, stepping beyond the boundaries of conventional reports.
We share our materials and analytics that hold practical significance for professionals and enthusiasts contributing to and advancing the DOMAIN NAME ECOSYSTEM.

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Research objectives

The survey "ccTLD and geoTLD governance within the Business Model Paradigm" was held with great support of the ICANN community members.

We carried out a survey and examined the responses from representatives of country-code and geographic domains to determine whether the domain management model is applicable and how efficient it is within the business framework.

Governance of geoTLDs and ccTLDs with a business mindset involves handling a country's or geo-region's digital asset through growth strategies, marketing efforts, and impactful PR campaigns. Competition for registrations is driven by market forces rather than administrative passivity.

The key strategic contradiction between ccTLDs and geo-TLD must simultaneously be local, trusted, and stable. At the same time they shall be competitive, modern, and marketing-attractive. This structural stress is the main difficulty of their promotion.

The result of this Study, as well as our expert analytical notes and recommendations, is crucial and useful for the positive developing of ccTLD and geoTLD, which are an essential component of the domain names industry.

Metodology, details

The study started at the end of 2024, finished in October 2025.
Data source: expert survey of ccTLD and geoTLD administrators and registries (President and CEO, Project manager, ICT & Internet Governance Manager, Data Protection Officer (DPO), Product Marketing Manager, Operations and Corporate Affairs Manager, Business and Operations Manager).
The respondents occupy high level expert positions, which ensures a high level of data reliability.

Number of questions to answer: 85.

Number of TLD studied: 16 (14 ccTLD, 2 geoTLD).
Number of registered domains in studied ccTLD/geoTLD is more than 12 millions.

Global Regions covered (according the ICANN regional definition): Africa, Europe, Latin America, Asia Pacific.

Study direction: to analyze the institutional, managerial and business approach of domain zones.

Key TLDs trends*

ccTLD

- Demonstrate continued growth and strategic relevance in 2025–2026 (~144.8M registrations by Q3 2025, ~40% of global domain registrations).
- Remain the primary instrument for local trust, regional SEO performance, market-specific, national identity branding.
- Some ccTLD policy adoption is further reinforced by digital sovereignty policies and regulatory alignment, strengthening consumer confidence and transaction activity.
- The market is highly concentrated, with a limited number of ccTLDs (.cn, .de, .ru, etc.) accounting for a substantial share of total registrations.
- For business ccTLDs deliver maximum value if aligned with localized marketing and geographic targeting, and they remain a core element of multi-country domain portfolios (alongside global extensions such as .com).

geoTLD

- Geographic top-level domains (GeoTLDs) are a subset of generic TLDs that signal a geographical or cultural community association (in this study .berlin and .moscow).
- Distinct from ccTLDs but conceptually related.
- geoTLDs function as brandable geographic identities, allowing businesses to align strongly with a city or cultural region without being country-specific.
- geoTLDs support local marketing strategies without eligibility restrictions tied to national codes.

*https://www.eurodns.com/blog/boost-local-branding-with-cctlds
https://domainnamestat.com/statistics/date/16-January-2026
https://www.cognitivemarketresearch.com/domain-name-registrar-market-report
https://www.accio.com/business/domain-name-trends-2026

Hypotheses BEFORE the study

- A modern registry should not only be the operator, but also the keeper of the country's digital identity.

- ccTLD Managers often miss business KPI’s settled and marketing approach.

- The growing popularity of ccTLD and geoTLD due to the capacity limit of well known gTLD.

- ccTLD might be a showcase of a passive marketing, lack of direct market responsibility (the registry does not compete directly for the market; revenues cover basic expenses; KPI’s of growth or recognition aren’t analizing).

- The historical role of registries is that of a "technical operator" rather than a brand: most ccTLDs (created at universities, research institutes, or government agencies focused on stability rather than growth). They are managed by engineers, not by product managers.
- As a result, the commercial management driver and marketing is perceived as irrelevant to the registry's important mission.

- Regulatory and political constraints: ccTLDs are often associated with the sensitive topic of sovereignty; they avoid active positioning in order not to look "commercial". This leads to excessive caution and a passive development strategy, which affects demand.

- A business approach is not necessary, a country code domain names will be registered anyway. But the business strategy of a geographical TLD is more flexible, subordinated to the “demand-market” and takes an active promotional position.

Research scale, overall data

COUNTRY CODE TLD

.PA (PANAMA)
.VU (VANUATU)
.NG (NIGERIA)
.AR (ARGENTINA)
.SU (SOVIET UNION)
.KZ (KAZAKHSTAN)
.SV (EL SALVADOR)
.FO (FAROE ISLANDS)
.RU (RUSSIAN FEDERATION)
.AM (ARMENIA)
.KE (KENYA)
.BR (BRAZIL)
.CR (COSTA RICA)
.PT (PORTUGAL)

GEOGRAPHIC TLD

.BERLIN
.MOSCOW

*On July 29, 2019, Roskomnadzor added the .su domain to the national domain zone

Research scale, overall data

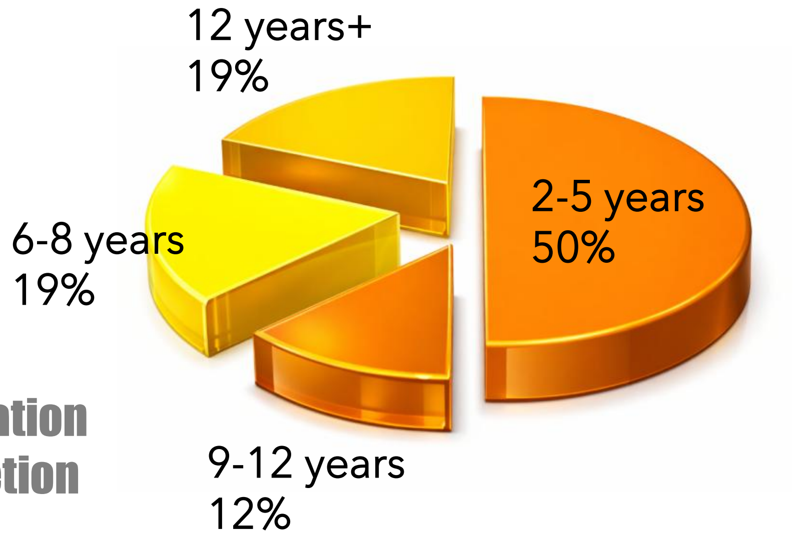
Domain extension	Domain's Year of birth:	Domain registry operator (an organization that manages TLD):	Cost of domain registration for customer (USD)	Total number of registered domains in TLD (at the time of responding, or updated by the end of 2025)
.RU (RUSSIAN FEDERATION)	1994	Technical Center of Internet	1.5	6034506
.MOSCOW	2013	FAITID	5.64	15865
.PA (PANAMA)	1990	NIC-Panama	25	16406
.VU (VANUATU)	1985	Godaddy	70	18026
.NG (NIGERIA)	1995	Nigeria Internet Registration Association (NiRA)	130	212890
.AR (ARGENTINA)	1987	NIC Argentina	25	675.979
.SU (SOVIET UNION)	1990	Technical Center of Internet	5	111600
.KZ (KAZAKHSTAN)	1994	KazNIC Organization	8.6	184693
.AM (ARMENIA)	1994	Internet Society NGO	20	44100
.KE (KENYA)	2003	KENYA NETWORK INFORMATION CENTRE	6	105936
.BERLIN	2013	dotBERLIN GmbH & Co. KG	40	47000
.BR (BRAZIL)	1989	NIC.br	7	5240000
.CR (COSTA RICA)	1990	Academia Nacional de Ciencias - Unidad NIC Costa Rica	70	20034
.PT (PORTUGAL)	1988	Associação DNS.PT	10	458913
.SV (EL SALVADOR)	1994	SVNet	25	9252
.FO (FAROE ISLANDS)	1997	.fo Council	60	9000

Average age of ccTLD zones **32yo**

Average age of geoTLD zones **12yo**

Average domain lifetime, years

(since registration date until deletion date)



Ducky's note

For TLD and domain registrars short-term use of the domain (= short registration lifecycle) leads to:

- Outflow of registrations reduces LTV (the cost of attracting a client is recouped upon renewal and additional servises using).
- Increased transaction costs, short domains consume more operations (billing, support, refunds, disputes, processing deletions, transfers, grace period).
- Destroying TLD reputation: short lifetime domains more often used for phishing; spam / fast-flux infrastructure.
- The distortion of marketing analytics (registration metrics) leads to errors in domain zone management.
- The financial loss: a short-lived domain is less or not monetized through hosting; mail; SSL; website builders; DNS / security add-ons.

Market

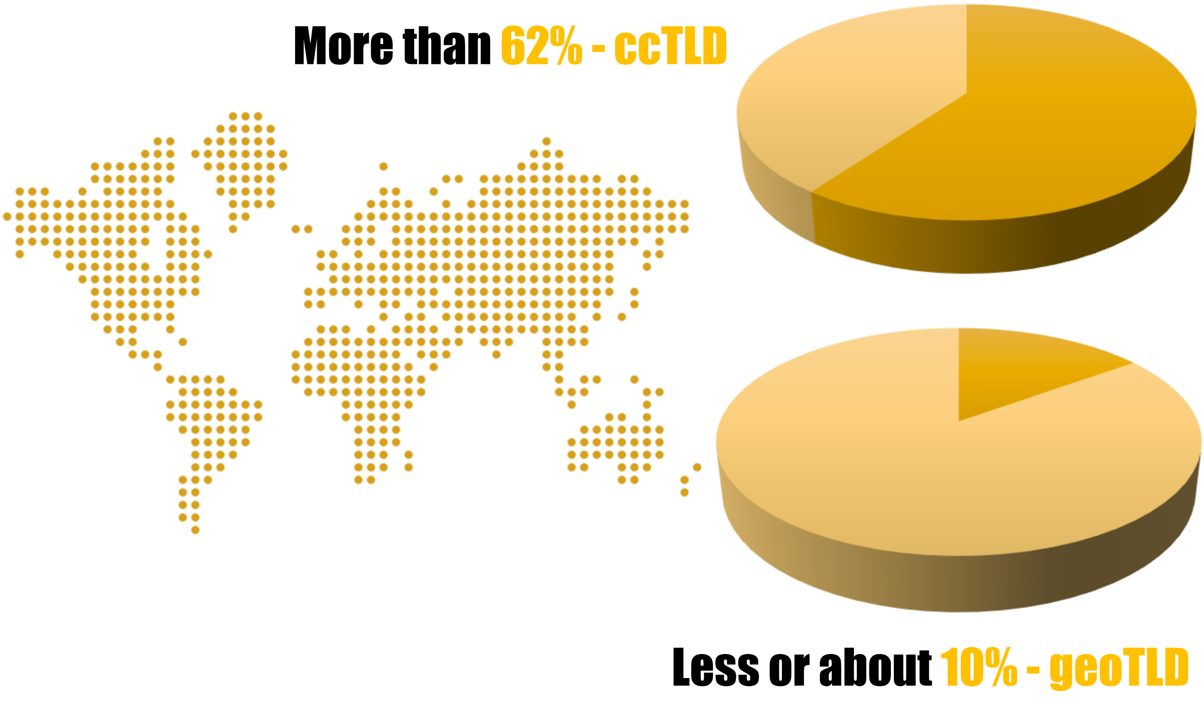
Not all survey participants provide (collect) data on market coverage. But most ccTLD indicate about 38% of the market is not covered, about 90% of market is a potencial of growing for geoTLD. This is a growth potential and a place of marketing efforts or natural growth (not yet achieved).

Ducky's note

The market potential is not a static quantity - new residents, businesses, investment zones and trending areas open up new opportunities for growth and capture of the "market territory", a new field of experiments and a variety of registrations in existing zones.

Domain's market share, average %

(registered domains)



Market

In TLDs shown on the slide, 70% or more of registrations are carried out by local customers (of the country or region).

Ducky's note

ccTLD and geoTLD (which are not matched with technical or innovation trends like .ai) are primarily a local trust infrastructure at first, then a global reach.
Their value is determined not by the number of registrations "from all over the world", but by the degree of integration into the economy, identity and digital habits of a particular territory.If the domains are mostly registered locally, this is not a weakness, but a confirmation of the correct positioning.

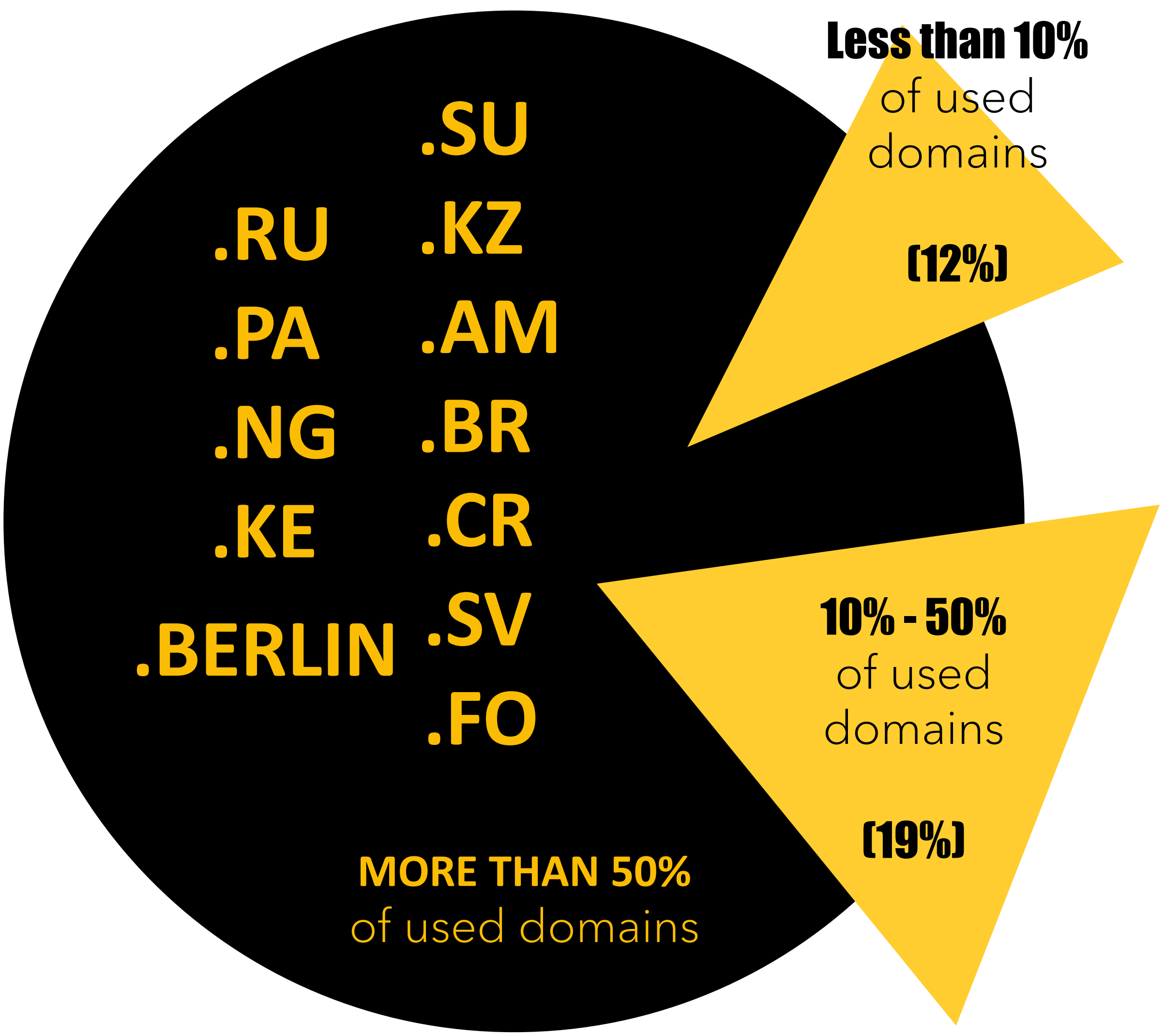
.RU
.PA
.NG
.AR
.SU
.KZ
.BR
.PT
.SV .BERLIN
.FO .MOSCOW

6 TLDs (by yellow color highlighted) have no easy or direct access to register domains for non-local customers

Average % of used domains

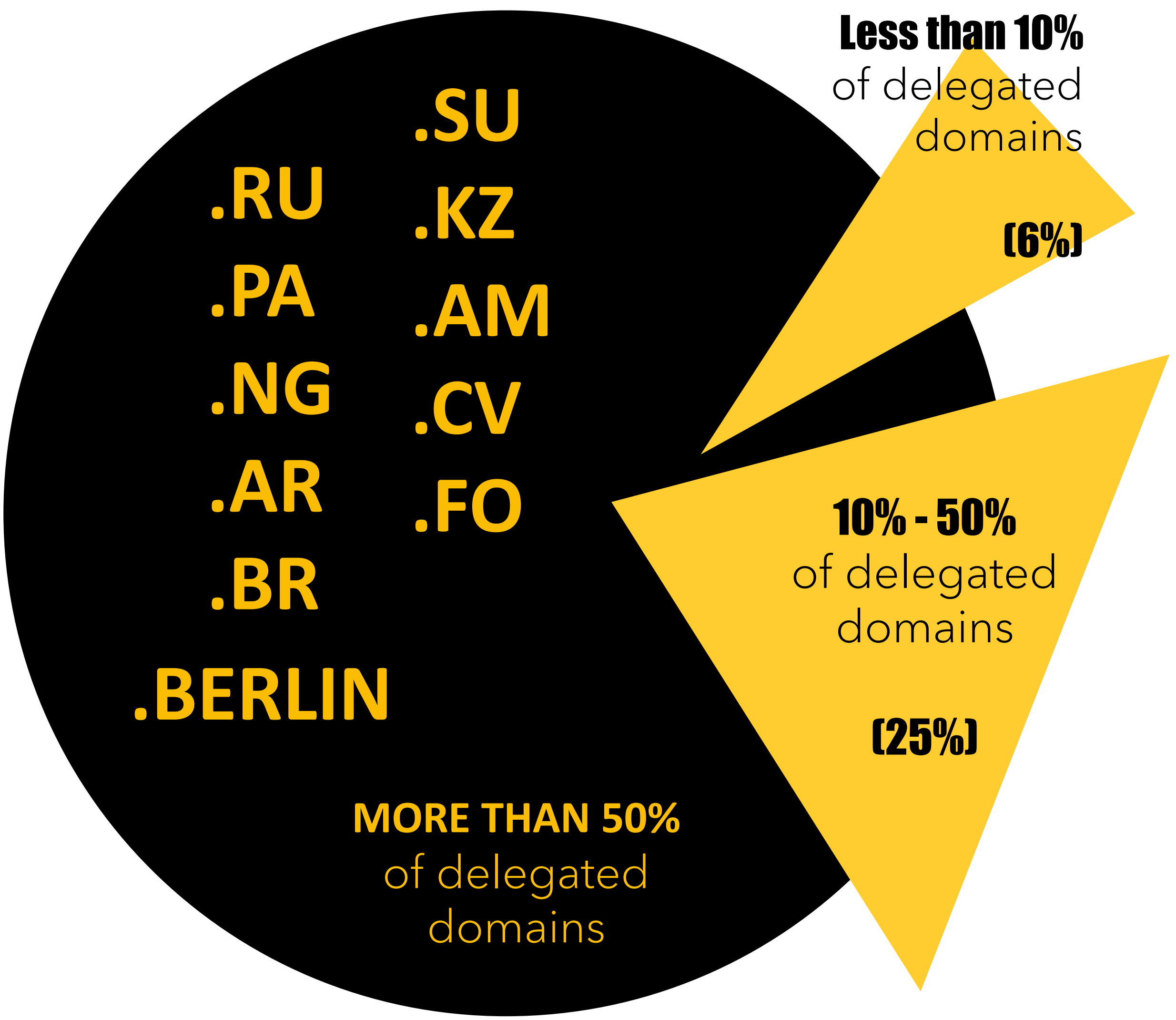
Average % of used domains shows the share of registered domains that are actively used for a real purpose: working websites, active email (MX records), business or personal landing pages, applications, APIs, redirects. This case study shows 69% have more than 50% of used domains.

Those TLDs are strong, utilitarian zone, good health of the namespace, show economic and digital activity.



Average % of delegated domains

Average % of delegated domains show the share of domains that have DNS delegation (NS records set).
Delegated domains don't mean used domains, but it is a necessary precondition. 67% of the domains show that more than 70% of the domains are delegated.
There is a showcase that most of registrants took the step from "owning" to "configuring". The quality of registrar onboarding and technical engagement of users are on the high level.
Industry experts point out that the red line of the metric is 55% edge (if lower - there is a warning sign about overpricing, trust issues, speculation in the namespace).
This block of research did not show any imbalances such as "High delegation + low usage". The level of delegation coincides with the level of use of the domain zone (domains in it)



Average % of parked domains

A parked domain refers to a registered domain name that isn't currently utilized by hosting for a particular website or email. It remains reserved («parked») for potential future use.

Benefits of parked domains include retaining a domain name (avoiding traffic loss when acquiring an additional one), providing an alternative to the primary domain, safeguarding the domain from fraud, and serving as a potential investment in domain assets for the future.

This case studied related the strong end-user base, there is a low level of parking in ccTLD and geoTLD (which not nesessarily but can reduce perceived value of the zone and hurts long-term renewal quality, indicate the level of speculation, dominance Investor vs end users, short-term registrations).

Less than 10%	10%-30%	More than 30%
.VU	.RU	.BR
.NG	.PA	.PT
.AR	.SU	
.KZ	.AM	
.CR	.KE	
.FO	.SV	
.BERLIN		
.MOSCOW		

PARKING ZONE

Number of accredited registrars

no accredited registrars (3),
less than 10 (1),
10 – 30 (4),
30 – 50 (1),
more than 50 (7)

TLDs of this study show approximately 3.8% growth per year.

TLDs without accredited registrars: the growth rate is the same.

Competitions

The usual group of the most popular top-level domains, that typically compete with country-specific and geographic domains includes .com, .net, .org. However, there are also new entrants capturing attention and registrations: .shop, .store, .website, .co & geoTLD.

Ducky's note

With geoTLD. case, the focus is not on direct competition within a defined geographic market but on the overall expansion of presence across different countries, where country domains and geographic domains enhance the capabilities of digital assets owned by a country, regions, or cities within it.

The main reasons (ranked by importance, noted by respondents) why customers opt for ccTLDs and geoTLDs instead of well-known gTLD extensions:

- **MORE OPTIONS/AVAILABLE DOMAINS FOR REGISTRATION**
- **VERY POPULAR EXTENTION**
- **CHEAPER PRICE**
- **REQUIREMENT OF HAVING A LOCAL WEBSITE**
- **LESS LIMITATION**
- **NATIONAL PRIDE**

The complexities of growth

The main growth challenges were identified by the respondents according to the gradation of the selected options.
The most significant factors for most of TLDs include:

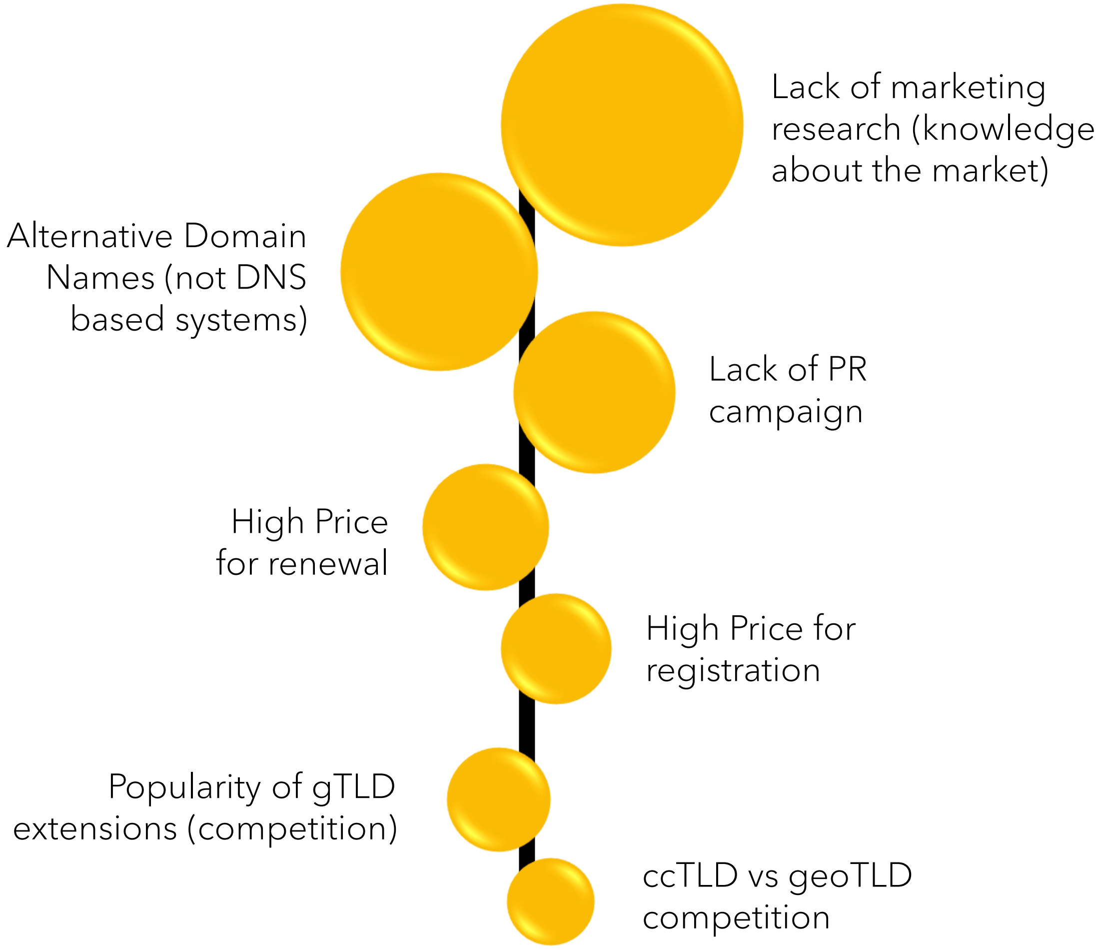
- Condition of economy (9 TLDs)
- Geopolitical situation (7 TLDs)

Other factors listed are:

- Financial constraints
- Recession, Inflation, Wars
- High costs of online presence services (hosting, e-mail)
- Overall condition of the global economy
- Large number of gTLDs and pricing factors, competition has become highly challenging for the sector
- Low use of Internet for commercial purposes
- Branding and awareness

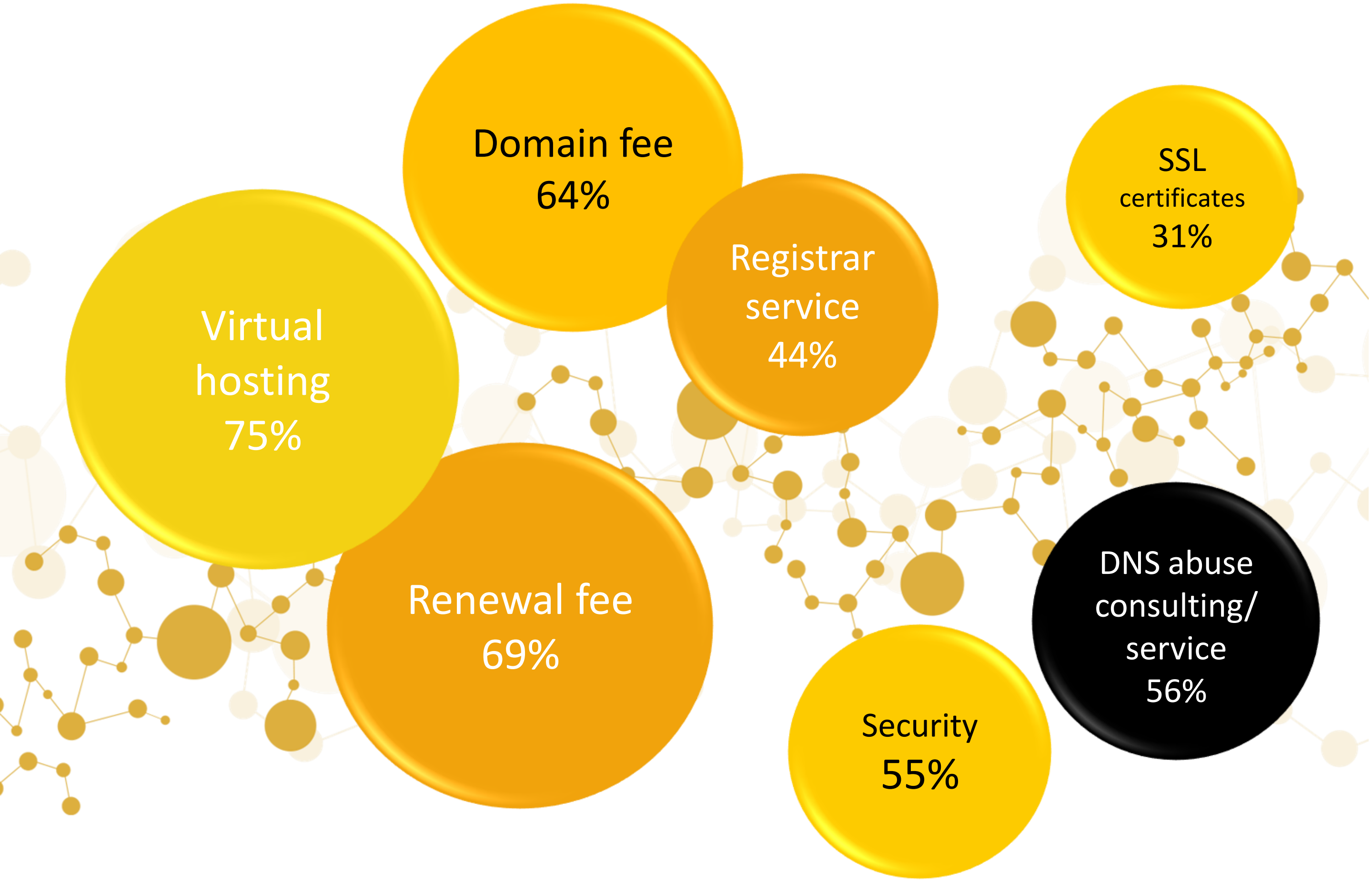
Business challenges

- **Competition** with popular TLDs hinders the growth of the domain zone for 43% studied TLDs.
- For 3 TLDs, competition with geographic domains is **an issue**, but in general, the internal geographic-national location does not lead to conflicts among local domain names.
- Majority of respondents acknowledge **a lack of market knowledge** and the need to **enhance PR** campaigns to boost demand and interest in domain zones.
- The rise in popularity of **alternative domains** is the reason for insufficient development in 37% of the studied TLDs.
- The market is less sensitive to domain registration prices, but 31% of TLD see a high **risk of non-renewal** due to the set price threshold for domain name renewals.



DOMAIN REVENUE STRUCTURE elements

The median of all respondents' answers is displayed as the average value.



THE MAIN SOURCE OF INCOME

THE MAIN SOURCE OF INCOME WAS IDENTIFIED:
Domain fee - for 50% studied TLD, Virtual hosting - for 19%, Renewal fee - for 13%, SSL certificates - for 13%, DNS abuse consulting/service - for 6%.

SECURITY
OF the DOMAIN NAME SPACE

2% capacity of domain zone are involved in DNS abuse in 4 TLDs only

13 (of total 16 studied TLDs) are signed DNSSEC

RESTRICTIONS FOR REGISTERING

Common restrictions for registering ccTLDs or geographic TLDs based on typical policy elements in rules and domain-registration restrictions:

- Many ccTLDs impose eligibility conditions that can act as barriers: some require local presence, such as a person, company or address in the country (common in restricted ccTLD policies) rather than open global registration. Certain local or professional third-level domains under a ccTLD require documentation tying the applicant to that category (e.g., education, government).

- Registries often maintain reserved lists of domain names that cannot be registered, including names that collide with other TLDs, country names, DNS terms, or terms the registry deems inappropriate, domains matching entries on a registry's stop list may be automatically rejected.

- Many ccTLD rules constrain how domains are used: certain registrations may be limited to specific use cases, such as government or institutional domains. Registrants agree not to violate laws, public interest standards, morality, or rights of third parties, and violations can result in denial or cancellation.
- Although not always framed as a barrier, cost and renewal rules affect access.

- Some ccTLDs set minimum registration periods and relatively high fees compared to gTLDs, which can deter some applicants.

- Procedural burdens may act as barriers (manual application review and bureaucratic verification can prolong registration. Some registries can refuse an application if it conflicts with prior rules on names or compliance requirements.

Outreach and PR

Ducky`s note

The promotion of ccTLD is not the sale of domain names, but the sale of local trust and digital identity.

The growth of ccTLD depends not on dumping, but on a strong national narrative, partnerships within the ecosystem, and long-term positioning.

GeoTLD is living more vivid PR life, managed and promoted as a product and "region" brand, sells identity and appeals to the lifestyle interests of the audience.

But both ccTLD and geoTLD need to strength the promo campaign. The core of the issue is competition with .com and well known gTLD, new gTLDs.

The undesirable consequences of the lack of a PR strategy are low emotional engagement and the complexity of the community-driven approach.

Now (unlike geo TLDs or new gTLDs) most ccTLDs don't have an such aspirational image attractive for startups and new projects, Small-Medium Enterprises.

Marketing has started with market analytics. Our respondents have been asked about **tools or ways used to analyze and target the audience:**

63% - organizing regular research (own tool OR buying research)

44% - have own analytics department

38% - participating in partnership program (Association, Coalition etc), common efforts and management

19% - implemented CRM system

6% - using social projects for targeting audience.

Area of customer's activity

The main areas of customer activities in studied TLD were identified by the respondents according to the gradation of the selected options from the high level of occupation to the lowest one (based on average value).

.RU .MOSCOW .KZ .SU .AM .KE .SV .FO	INDUSTRY, PRODUCTION, BUSINESS
.RU .VU .NG .KZ .FO	GOVERNMENTAL AND STATE SERVICES
.VU .SV	EDUCATION
.NG .PT .SV .KE	E-COMMERCE
.CR .AR	SOCIAL AND CULTURE
.MOSCOW .PA .AM .PT	LOCAL BRANDS
.PA .BR .BERLIN	FOREIGN BRANDS
.AR .BERLIN .CR .BR	SOCIAL MEDIA PLATFORMS

TLDs that chose the sphere as their first and second options (in the ranking) are listed from the left.

MARKETING TACTICS

Main promo direction of studied TLDs:
- Banner on websites
- PR campains
- Social media
- Strategic partnerships with Registrars
- Giving discounts to Registrars
- Support visibility of domains in the public
- Seasonal promotions are strategically scheduled during periods of lower revenue as a regular practice
- Social projects

Quality of interaction with target audience
might be BETTER for
38%

Quality of interaction with customers
esimated as
EXCELLENT!
44%

Emails, Social Media, Website, Partnership campaign, PR campaign set (all media+target adv)

HAVING promotion and/or REVISING outreach strategy
69%

the presence or absence of a promo strategy has no ties with dynamics of the domain growth
(based on answers)

The growth conditions

The main **growthconditions** for TLD were identified by the respondents according to the gradation of the selected options. The list of the most significant factors includes:

- **economic development** at the national or regional level,
- **PR campaigns** that capture attention and stimulate registration demand,
- **tourism growth** (= introducing a new form of consumer demand, increasing the number of service businesses and goods for visitors, establishing new enterprises, multiple registrations).
- **alignment of technical trends** with the TLD name or spontaneous popularity resulting from emerging socio-cultural currents plays a lesser role.
- **price, accessibility, and geopolitical popularity** are generally ranked lower. However, for certain TLDs (.ru, .moscow, .pa, .vu, .ng, .ar, .su), these factors have been major contributors to growth in recent years.

THE MAIN CONDITIONS FOR THE TLD GROWTH

Q “WHAT IS YOUR EXPECTATION ABOUT ACTION BY ICANN FOR SUPPORTING YOUR DOMAIN IN PARTICULAR?”

“ ICANN financial plans do not have support for existing TLDs”

“ ICANN has been very supportive”

“ ICANN should develop best practices polices for ccTLD to adopt but no to regulator ccTLD. The Country should Manage their own ccTLD etc”

“ Satisfactory”

“ Continued Support and Cooperation. Policy Development: ICANN should actively involve .KE stakeholders in the development of global DNS policies that consider the specific needs and challenges of ccTLDs like .KE"

“ As a ccTLD, we expect ICANN to continue supporting our domain by facilitating collaboration on global Internet governance issues and providing technical resources to ensure the stability and security of our infrastructure. We also value ICANN's role in promoting policies that help sustain the growth of local domain markets, particularly through initiatives that support small businesses, startups, and the broader digital ecosystem within our country. Additionally, we anticipate ICANN's ongoing assistance in promoting the .cr domain internationally, ensuring that it is recognized as a trusted and secure choice for both local and global users”

“ We expect ICANN to maintain a stable, transparent, and inclusive policy framework that supports the unique needs of ccTLDs. We value continued collaboration, especially in areas like DNS security, resilience, and multilingual support, ensuring that the .PT domain remains accessible, trusted, and aligned with global best practices”

“ Keeping the internet safe and secure”

Q HOW WILL THE NEW ROUND OF gTLD IMPACT THE DOMAIN MARKET AND GOVERNANCE OF ccTLD & geoTLD?

“ Prices will go up”

“ Introduce greater competition into the domain name services industry”

“ It will impact its popularity internationally.
Raise competition with the existing ccTLD”

“ No impact”

“ Increased Competition. Brand Owners: The new gTLD program will provide brand owners with more opportunities to protect their brands online by registering domain names in relevant gTLDs. ccTLDs and geoTLDs will need to innovate and adapt to the changing landscape to remain relevant”

“ Limited impact, as new TLDs mostly address niches”

“ Not at all, considering the 2012 round”

“ The new round of gTLDs is likely to have both challenges and opportunities for the domain market and the governance of ccTLDs and geoTLDs. On one hand, the increased availability of gTLDs could create more competition in the global market, potentially leading to price pressure and fragmentation of the domain space. However, this also presents an opportunity for ccTLDs like .cr to differentiate themselves by emphasizing their local identity, relevance, and the trust they offer to users in specific regions or countries”

“ The new gTLD round may intensify market competition, but it also highlights the importance of preserving the distinctive role of ccTLDs and geoTLDs in representing national and regional digital identities”

“ Very excited to see”

Conclusion

The study confirms that a business-oriented governance model directly correlates with healthier and more sustainable ccTLD and geoTLD growth dynamics.
Non-profit and public-oriented management models prevail. The state often participates indirectly, through delegation of authority.

Business mindset strengthens performance.
TLDs managed as digital products – with defined KPIs, structured marketing, registrar partnerships, and revenue diversification – demonstrate stable annual growth (~3.8%), high delegation (>70%), and strong real usage (>50% in most zones).

Governance limited to technical operation without market positioning constrains growth potential. Accessibility materially influences expansion. Open registration policies, reduced procedural barriers, and transparent eligibility rules broaden addressable markets.
TLDs with strict local-presence or bureaucratic requirements restrict international uptake and slow scalability. However, strong local orientation (70%+ local registrants) reinforces trust and economic integration, which is an advantages in competition rather than a weakness.

Pricing impacts renewal quality more than initial demand. The market is moderately price-sensitive at registration, but renewal thresholds significantly affect long-term retention. Short lifecycle domains reduce LTV, distort analytics, increase operational costs, and damage country- and geo- namespace reputation.

Sustainable pricing policies support both financial resilience and ecosystem health (especially during periods of economic challenges and geopolitical turmoil).

Conclusion

Marketing and PR are growth drivers. Lack of structured PR and insufficient market analytics are acknowledged constraints and area of potential growth.

GeoTLDs operate with stronger brand narratives, while many ccTLDs still rely on historical trust rather than aspirational brave positioning.

Growth is linked more to economic development countries and regions (as very attractive for investments, tourism) and visibility campaigns than to dumping or speculative spikes.

Revenue diversification stabilizes governance models. While domain and renewal fees remain core income streams, hosting, security, and DNS-related services significantly reinforce financial sustainability. A diversified portfolio reduces vulnerability to registration volatility.

Competition from gTLDs and new rounds increases pressure but isn`t destructive and doesn`t eliminate ccTLD/geoTLD relevance (the differentiator is territorial identity, trust infrastructure, and integration into local economies).

Overall Conclusion

Many country code top-level domain (ccTLD) registries are non-profit, governmental, or quasi-governmental entities. While their primary focus is on operational stability, their business processes also reflect the goals of rapid growth and market orientation.

Competition from well-known gTLD is intense. Nevertheless, ccTLD and geoTLD often serve as the default choice for local government, state initiatives, private investments, and brands entering the market.

Without a business-oriented approach ccTLD will remain a mere «technical resource» with organic growth, rather than a branded digital space characterized by accelerated registration rates.

National pride and identity frequently emerge as key factors in competitive success, driven by the geopolitical shifts reshaping the global landscape. Within this context, ccTLD can be seen as a form of political symbolism.

The modern intensifying struggle against digital platforms, coupled with their reputational challenges and the trust crisis arising from geopolitical and political turmoil, offers greater opportunities for domains that positioned as «your own digital space» - trusted, beautiful and defended ccTLD and geoTLD.

The key growth equation emerging from the study:

ACCESSIBLE REGISTRATION
+
SUSTAINABLE PRICING
+
CONSISTENT PR NARRATIVE

\+ BUSINESS KPIs SETTLED

= HIGHER RETENTION, HEALTHIER NAMESPACE, AND SCALABLE GROWTH.

We appreciate all the respondents, experts who support this project and provided data. We enclose names those who considered to be listed:

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Lito Ibarra
Guðrun Poulsen

We honor the memory of **Rubens Kuhl**, who will always live in our hearts ♥

Laura Margolis,
Natalia Filina

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