

## C. Executive Summary

### Background to RIPE NCC Survey 2013

The RIPE NCC Survey 2013 is the sixth of its kind that the RIPE NCC has commissioned since 2002, and it is the second to probe the opinions of both RIPE NCC members and non-members, who are referred to in the survey as “other interested parties”. The survey asked these groups to rate and comment on the current RIPE NCC service offering and the direction the organisation should take in the coming years.

To ensure the anonymity of respondents and the neutral analysis of results, the RIPE NCC re-commissioned an independent organisation with experience in the Internet industry and with conducting industry analysis. The Oxford Internet Institute (OII) was asked to administer the 2013 survey on its behalf. Visiting Research Associate Desiree Miloshevic, together with Scott Hale, Ginette Law and Joshua Melville from the OII, led the analysis team.

The RIPE NCC Senior Management and Executive Board tasked the OII with:

- Getting feedback from RIPE NCC members and other interested parties on the performance of the RIPE NCC;
- Soliciting the opinion of RIPE NCC members and other interested parties on the direction the RIPE NCC should take in the coming years;
- Identifying the key areas in which the RIPE NCC should concentrate its efforts;
- Examining the requirements of members and other interested parties in the different geographical areas of the RIPE NCC service region as well as the views of the Internet community around the world; and
- Attracting as many responses as possible.

### Methodology

The survey was formulated following the focus groups that were conducted with RIPE NCC members and other interested parties in the RIPE NCC service region in November 2012 and earlier in 2013 to identify the issues that concerned them and to get their opinions on the issues that should be raised in the survey (see section B).

RIPE NCC members from all categories, ranging from small to large membership organisations, were consulted, as well as representatives from government, regulatory bodies and other interested parties in the RIPE NCC service region. Participants in the focus groups received a list of subject areas for discussion prior to the meetings so that they could prepare for the focus group sessions (see section B).

RIPE NCC members and other interested parties who attended the focus groups informed the consultants of the issues that concerned them most. The survey questionnaire was formulated using this feedback as a basis.

The survey questions were divided into fourteen sections:

1. General RIPE NCC Services
2. Membership Administration
3. Corporate Governance
4. Registry and Resource Distribution
5. Internet Governance and External Relations
6. Training and Education
7. RIPE NCC Outreach and External Relations
8. IPv6 Deployment
9. RIPE NCC Tools and Measurements
10. RIPE NCC Communications
11. RIPE Meetings
12. RIPE Policy Development Process (PDP)
13. RIPE Database
14. Network Security

The online survey was launched on 17 May 2013 and closed on 24 June 2013. The third party tool SurveyMonkey was used to collect responses and the OII had sole control of the SurveyMonkey account for the duration of the survey. Most questions asked respondents to rate their satisfaction, awareness or opinion of importance on a scale from 1 (Low) to 7 (High). Respondents could choose Not Applicable or No Comment if they wished. A small number of mandatory questions were included in the survey. Participants also had the opportunity to leave comments in each section. Most questions were optional, so the response rate for a single question may vary. The Appendices to the survey report contain all question charts and all the comments made by respondents exactly as entered.

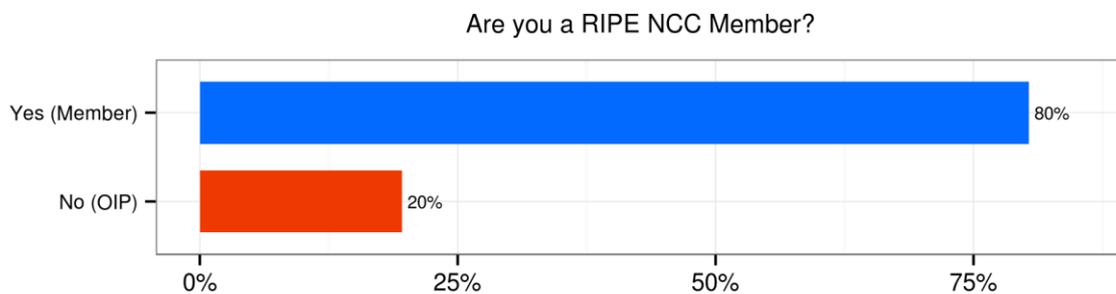
It should be noted that qualitative data and comments collected through this online survey may at times be biased or not fully represent the RIPE NCC's membership and community. Open-ended questions were not compulsory to answer. Data was only collected in English. Many people who participated in the survey may not have sufficient English skills or knowledge about their organisation to feel inclined to leave comments. Nonetheless, the data collected for this study (both quantitative and qualitative) provides rich information that should assist the RIPE NCC in meeting its objectives.

## Survey Participants

The survey received a total of 3,631 respondents from 114 countries, almost three times the number of responses collected in 2011. 75 of the 76 countries in the RIPE NCC service region were represented. Overall, 2,167 respondents completed the survey to the last page, which is by far the most a RIPE NCC survey has received to date. The biggest responding countries were generally those with the largest membership base.

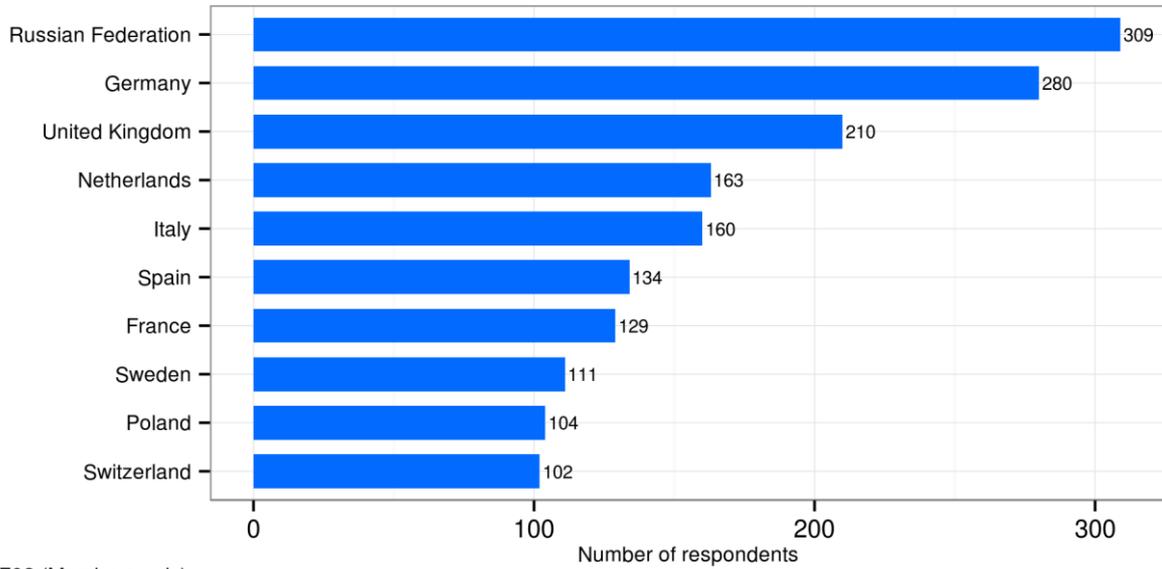
Russian Federation	401
Germany	321
United Kingdom	283
The Netherlands	209
Italy	184
Spain	153
France	144
Sweden	133
Poland	118
Switzerland	112

Of the total respondents, 80% indicated that they were members of the RIPE NCC while the remaining 20% represented other interested parties. These other interested parties are noted as such in the charts that follow.



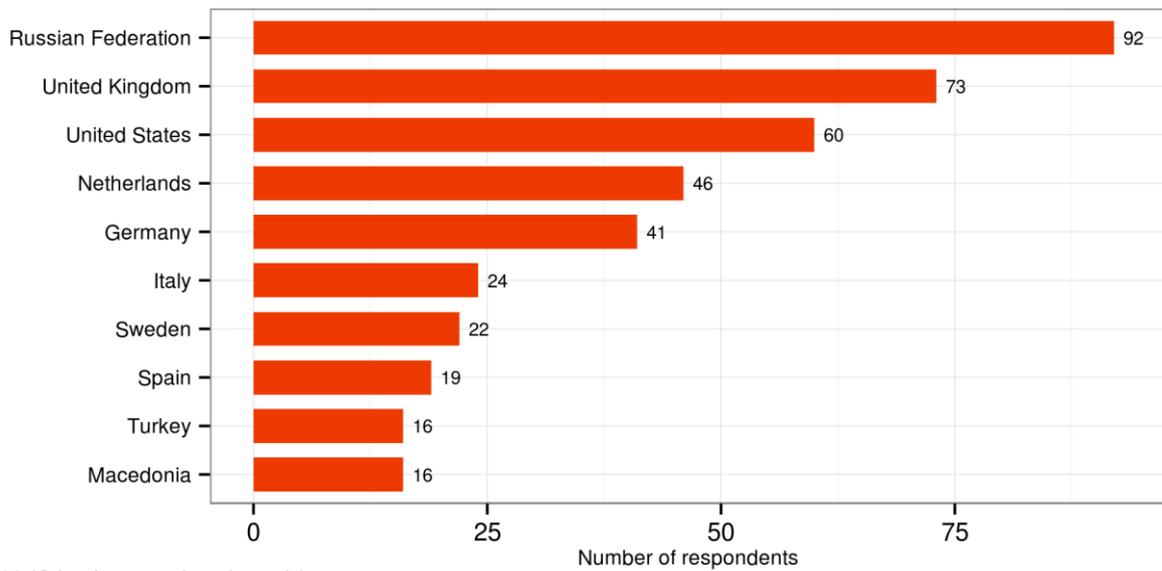
N=3631; Members=2919; Other interested parties (OIP)=712

Respondents per country (top 10)



N=1702 (Members only)

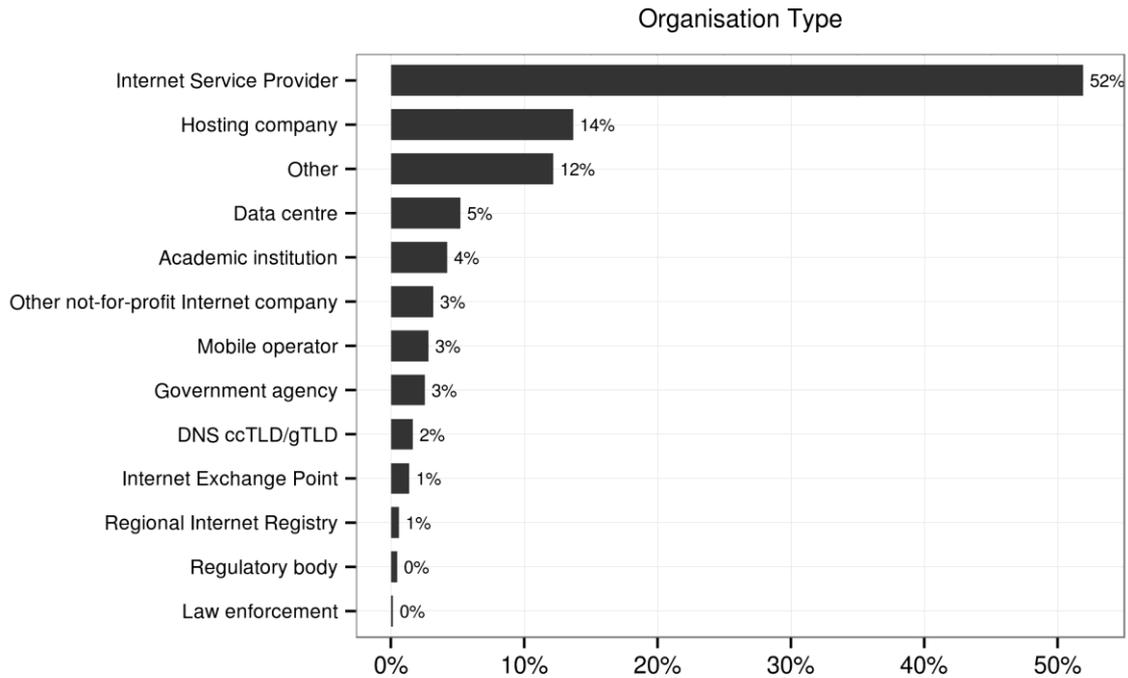
Respondents per country (top 10)



N=409 (Other interested parties only)

### Respondent Organisation Types

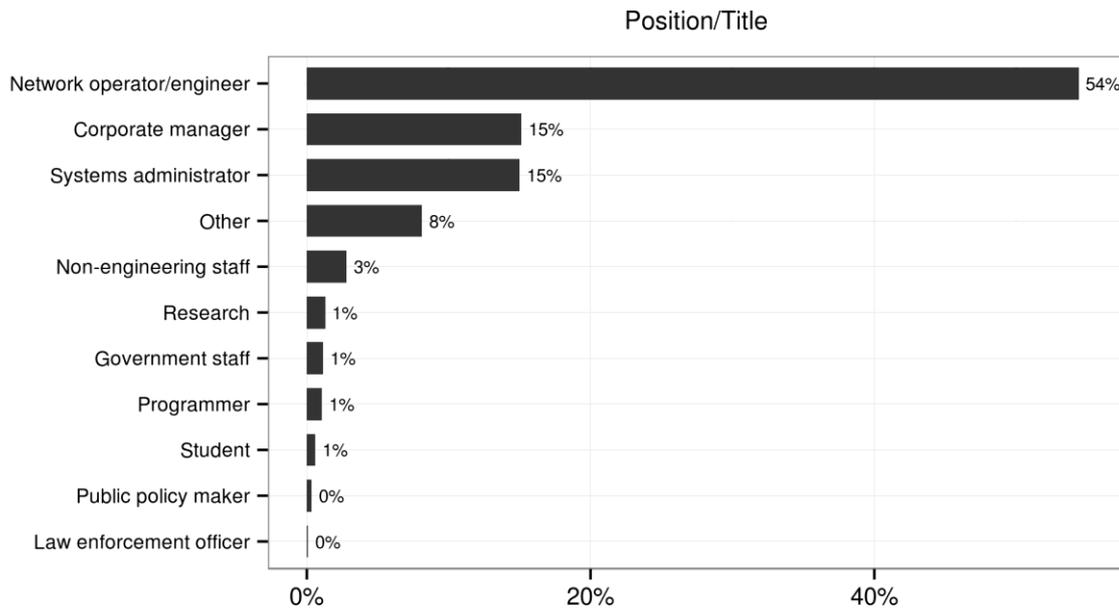
More than half of the respondents indicated that they worked for an ISP while other major groups included hosting companies, data centres and academic institutes. Around two-thirds of these organisations were small to medium-sized entities with the remaining third classifying themselves as large or very large.



N=2167 (Members and other interested parties)

### Respondent Roles

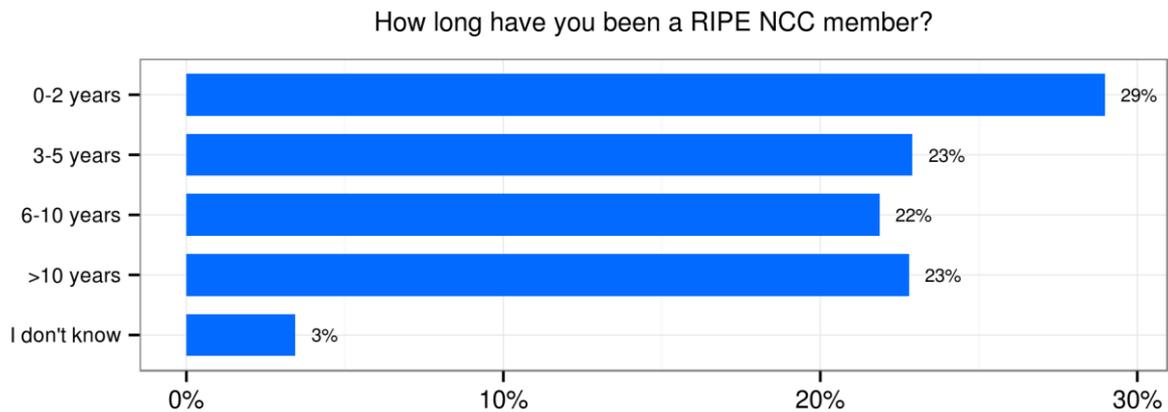
More than half of the respondents were network operators/engineers; around 15% were corporate managers; 15% were systems administrators; and the rest were made up of a variety of other positions.



N=2167 (Members and other interested parties)

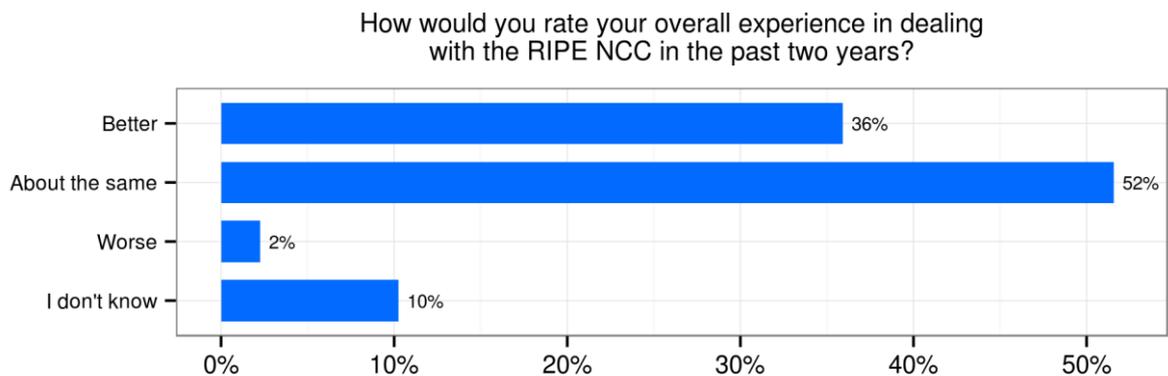
### Membership Duration and Recent Experiences

A range of older and newer members participated in the survey. Newer members indicated that they were generally satisfied with the support given through the membership process (mean=5.98, n=760) and the process itself of becoming a RIPE NCC member (mean=5.76, n=760).



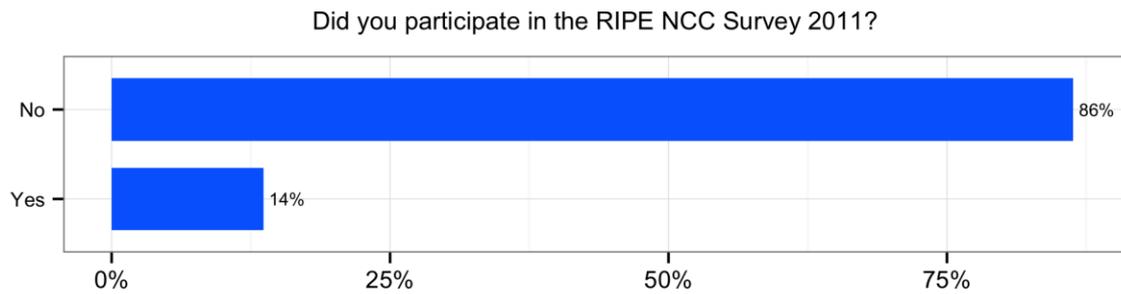
N=2881 (members only)

Participants who have been RIPE NCC members for longer than two years were asked to rate their experience in dealing with the RIPE NCC over the past two years. Just over half responded that their experience was about the same while 36% said it had improved. Only 2% said their experience had become worse.

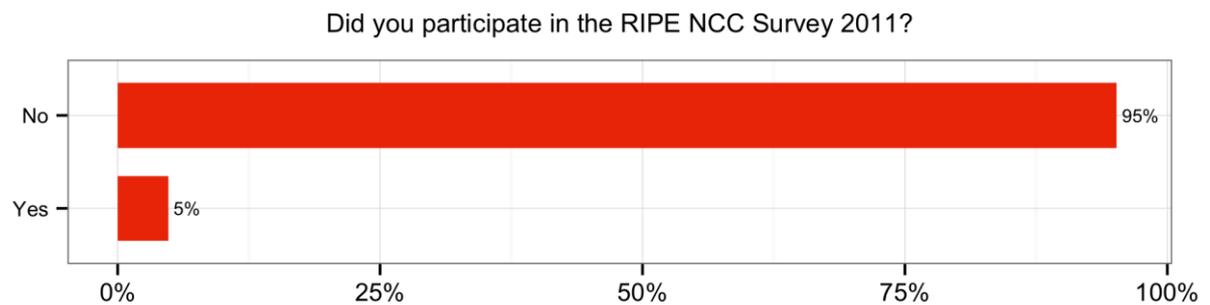


N=1902 (members only)

There was an abundance of new respondents who participated in the 2013 survey compared to the previous edition conducted in 2011. (In 2011, there were 1,266 participants, and 825 completed the survey.) This increase in participation greatly strengthens the findings from the survey, allowing the RIPE NCC to make decisions about its services, activities and administration that are informed based on a large sample of respondents.



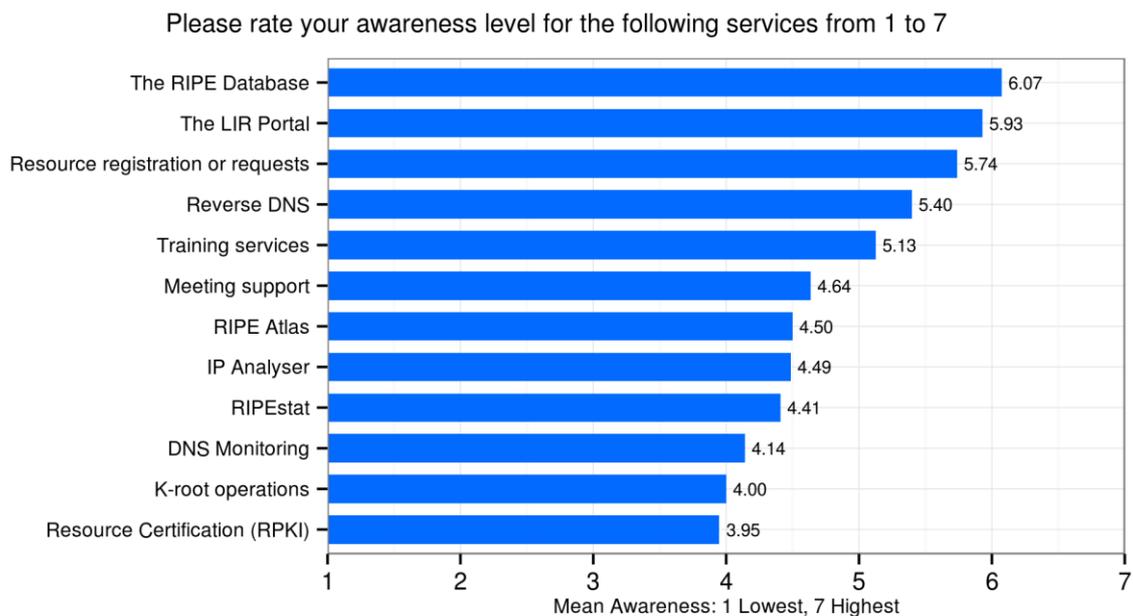
N=2864 (Members only)



N=705 (Other interested parties only)

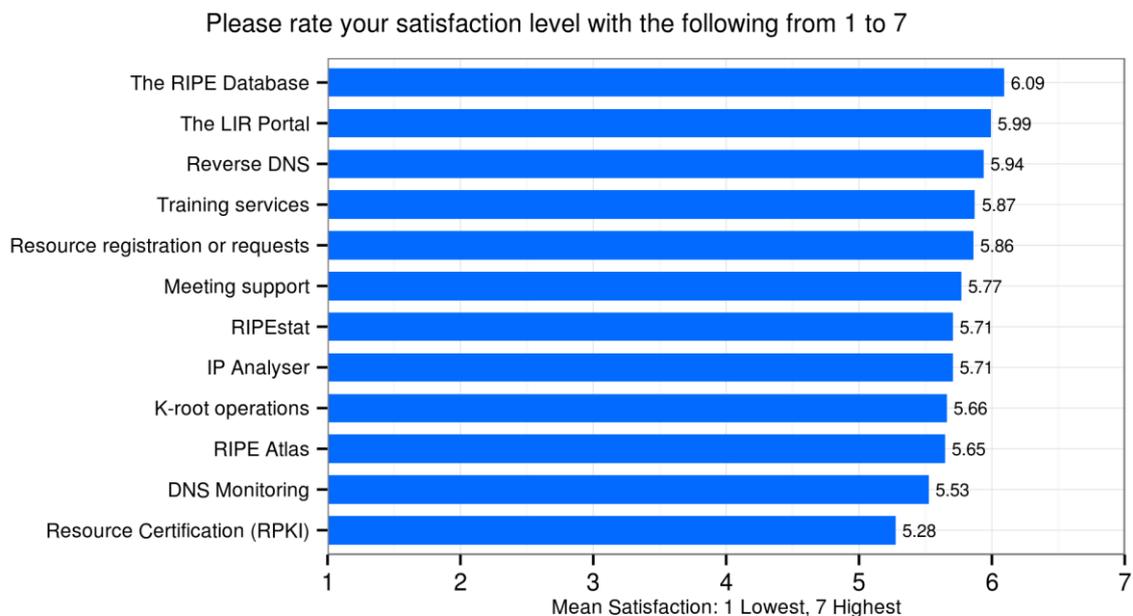
## Ratings on Services

Awareness levels for core services rated very highly among members, although awareness-raising efforts are needed in other areas such as Resource Certification (RPKI), K-root operations and DNS Monitoring.



N=2219 (Members only)

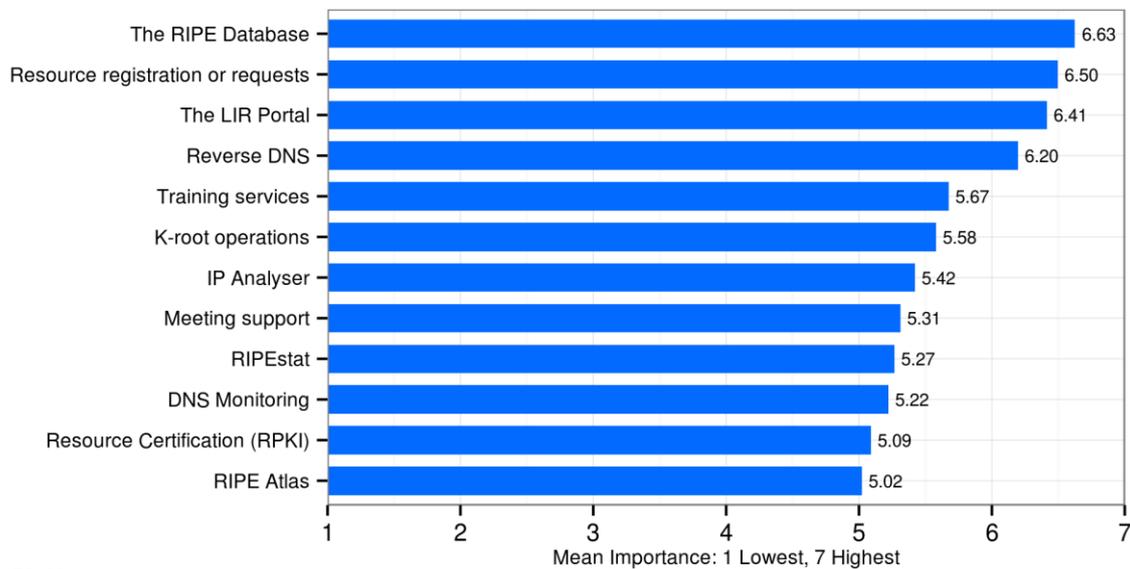
Satisfaction levels were high across all services provided by the RIPE NCC, including for those where awareness levels were relatively low.



N=2165 (Members only)

The importance ratings for RIPE NCC services showed high levels for the core services of RIPE Database, resource registration, the LIR Portal and reverse DNS, with all these scoring over 6 out of 7.

Please rate the importance level of the following services and activities from 1 to 7



N=2173 (Members only)

## Open Questions

All individual comments are anonymised and provided in Appendix 3. The comments highlighted in the text of the survey report are those that appeared most commonly for each question.

## Overview of Findings

In general, respondents were very satisfied with the way the RIPE NCC provided and delivered its services. However, there were some awareness issues of non-core services. All core and non-core services received ratings of over 5 out of 7 with regards to their importance.

The vast majority of respondents found the ways in which they can contact the RIPE NCC Customer Services and the support that they received from them to be extremely satisfactory. In general, phone contact would be appreciated, as would longer online chat service hours and assistance in languages other than English.

The RIPE NCC's corporate governance structure rated highly. Some respondents suggested increasing the total amount of members on the RIPE NCC Executive Board, increasing operational transparency and ensuring that the membership is engaged early in major decision-making processes.

Many comments indicated that respondents do not vote at RIPE NCC General Meetings because they simply did not have the time to get involved. Quite a number indicated that they had only recently become members and felt they were too new to the process to be involved, or they found the voting process too complicated.

In general, the respondents indicated that they were quite satisfied with visibility of the RIPE NCC's Internet governance and external relations work. They found the RIPE NCC's engagement with governments in its service region to be very important as well as the RIPE NCC's representation of their interests to governments.

Those that had participated in onsite training courses were extremely satisfied with the courses, the level of technical training provided by the RIPE NCC and the training documentation provided by the RIPE NCC. The E-learning Centre and the RIPE NCC webinars both received very high ratings. Around two thirds of the respondents indicated that the RIPE NCC should further develop its remote training options.

The survey respondents were quite evenly split about whether or not the RIPE NCC should train external parties to be trainers, with about one third supporting this, one third not and one third not knowing.

With regards to providing training in other languages, around 41% of respondents indicated that the RIPE NCC should invest in providing training and documentation in languages other than English; 47% indicated that the RIPE NCC should not do this; 12% did not know.

About two-thirds of the respondents indicated that their organisation had a formal plan for IPv6 deployment. About a third of the respondents indicated that they had an IPv6 transition budget. And two-thirds indicated that their organisation had staff trained for IPv6 deployment.

With regards to assisting IPv6 take-up, respondents suggested that the RIPE NCC needed to help in convincing decision makers via business cases, as well as clearly highlighting the advantages of IPv6, making IPv6 address requests much easier, or possibly stopping the handing out of IPv4 addresses and not allowing IPv4 transfers to take place.

Many respondents indicated that the RIPE NCC measurement tools were not easy to find on the website and that they were not aware of most of them. Some suggested providing training for the use of these tools while others simply asked to make them more user-friendly. A number of respondents suggested publishing real world use cases of these tools. There were also requests to allow access to the raw data, create more APIs and make them open source.

When asked if the RIPE NCC should invest member funds in communicating in languages other than English, some 2,172 respondents answered this question. Of those, 35% said “Yes”; 52% said “No”; and 13% did not know. A number of respondents felt that it was a good idea but that the RIPE NCC should only translate a small amount of the web content. Others suggested that, even if it’s not official translations, a RIPE NCC staff member that can explain things (by phone, email or in person) in a local language would be beneficial.

Many of the respondents indicated that the website navigation needed to be improved, as well as the website usability and structure. A number of respondents suggested multi-lingual support on the website while others suggested using simpler English with fewer acronyms.

Respondents suggested that the RIPE NCC could further help facilitate networking opportunities between attendees at RIPE Meetings. A high number of respondents requested that the RIPE NCC publish information that could help explain the benefits and value of attending RIPE Meetings that they could give to their management.

A significant number of respondents indicated that the RIPE Database was difficult for newcomers to understand and update. There were numerous suggestions to develop a more user-friendly interface and provide more tutorials, more how-to documents, better syntax error explanations and more FAQs.

Many respondents indicated that the RIPE NCC should promote the use of their tools to the Internet security industry, as well as increasing engagement with that industry. About a third of the respondents suggested further development of Resource Certification (RPKI).

Finally, many comments suggested that the survey was much too long and that this needs to be shortened next time.