

NASK

2017



registry.pl

.pl domain name market

Annual Report 2017



Wojciech Kamieniecki
NASK PIB Director

Dear readers,

For the Polish domain 2017 was braced by two events essential in respect of **NASK PIB's** development towards modern management of a ccTLD registry and extension of the **.pl registry's** activity to active participation in international affairs.

On 28 February 2017 the project on NASK's cessation of providing direct service of .pl domain name registrants was officially completed. As a consequence, NASK switched entirely to a modern model of running a ccTLD registry in accordance with best European practices and referred the total service of .pl domain names to registrars. The second event, **IGF Poland - The Central European Internet Governance Forum**, important in view of NASK's engagement in works on the development of the Internet, was held on 21 November 2017. The event was characteristic of openness and multilateral dialog on the role and shape of the Internet.

In the report on the **.pl domain name market** you will find information pertaining to the events, mentioned above, and many other activities in which the **.pl registry** was involved. Furthermore, the publication will contain interesting breakdowns of data on, e.g. number of .pl domain names at the end of 2017 and the position of the Polish domain in the world and Europe amongst ccTLDs as well as summaries of .pl domain market in Poland, prepared specially for the 2017 Annual Report.

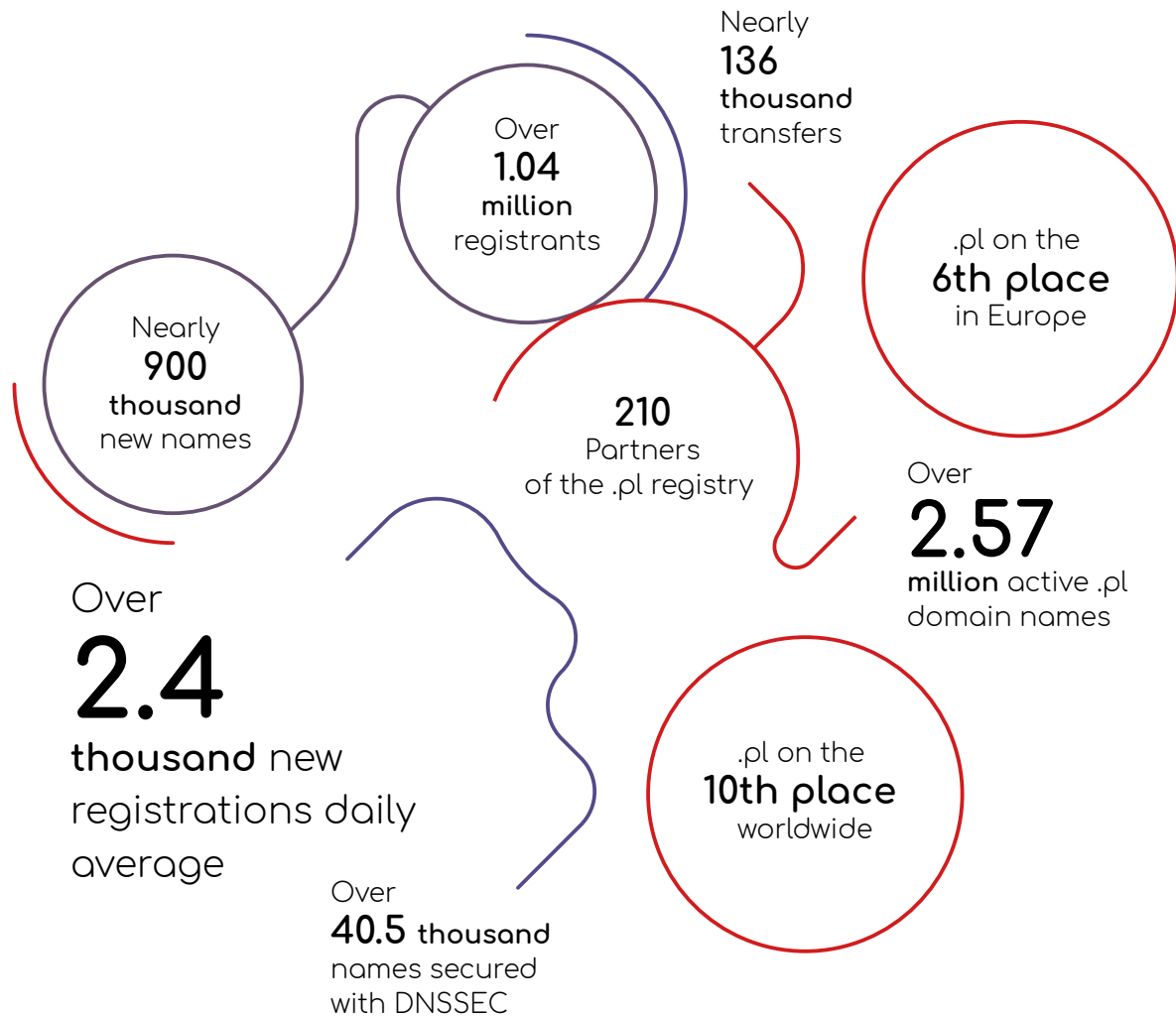
An important topic of 2017 was the development of the **Partner Programme**, therefore in this publication as well as in quarter reports you will find, among others, data on the shares of particular registrars in the .pl domain market. Last year's 15 year jubilee of the **Partner Programme** became an inspiration, at NASK, to initiate meetings of particular kind, **Open Days of .pl registry**, giving an opportunity to discuss plans and share experience with the registrars. In December 2017 a second edition of the **Open Day of .pl registry** was organized for entities interested in cooperation. The Partner Programme constitutes an offer reflecting current needs of innovative and secure solutions in the domain market in Poland. Participation in events, offered by the **.pl registry**, facilitates taking a proper business decision basing on the knowhow and long experience of NASK's experts. You are invited to start cooperation on Internet domain names within the frames of the **Partner Programme** of the .pl registry, broader described in the **2017 Annual Report**.

I encourage you to get acquainted with the report on the **.pl domain name market**, first annual in the history of the Polish registry, compiled not only for readers familiar with the domain industry, but also for those of you who want to broaden your knowledge. It is also worthwhile to note that due to a diverse and attractive form as well as objective review of most important information on the .pl domain name market in Poland, the **2017 Annual Report** becomes a new and important publication of **NASK PIB**.

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2017 in .pl registry – facts and figures



ccTLD market summary

In 2017 the total number of .pl domain names decreased by ca. 4.7%, amounting to over 2.576 million. The .pl domain remained on the 6th place among European ccTLDs (country code Top-Level Domain), on the 10th place worldwide and 16th place among all TLD registries.

In 2017 the highest decrease of serviced domain names was recorded by Home.pl (over 178 thousand .pl domain names, i.e. over 27%). Among 10 biggest .pl registrars 5 entities recorded a decline in the number of serviced domain names, with 3 companies thereof being incorporated in the Home.pl group. With the largest volume of domain names, nazwa.pl, reporting a ca. 4 percent increase, became the market leader. Home.pl took the second place, while OVH, having the highest increase in sales dynamics (almost 12%) from amongst 10 biggest .pl registrars, moved up to the third place. In Poland the market growth potential stems from the fact that many micro and small businesses do not have own Internet domain name. A beneficial prerequisite for market development in future is stable increase in the number of .pl registrants – at the end of 2017 their number exceeded 1.04 million, being by almost 20 thousand higher than at the end of 2016.



Guest stars: nazwa.pl and OVH

— nazwa.pl

A Cracow based company, nazwa.pl, has been servicing the largest number of .pl registrants since the fourth quarter of 2013. In the first quarter of 2017 the company achieved the position of a leader in the number of registrations. Furthermore, in the second quarter nazwa.pl took the lead in the number of serviced .pl domain names which, at the end of the year, amounted to over 578 thousand.



578 thousand
supported
domains



38 thousand
DNSSEC
secured names



— OVH

A global provider of cloud solutions has been in the forefront of .pl domain name registrars for years. The company focused in technological development, dedicated solutions and the security of serviced .pl domain names. At the end of 2017, OVH was servicing over 38 thousand names secured with DNSSEC protocol which constituted over 94% of all names of this kind.



Number of maintained .pl domain names

At the end of 2017, 2 576 063 .pl domain names were being maintained. During entire 2017 there were registered 883 258 new .pl domain names. It means that every ca. 40 seconds one .pl domain name was registered. A .pl domain name contains on average 11 characters.

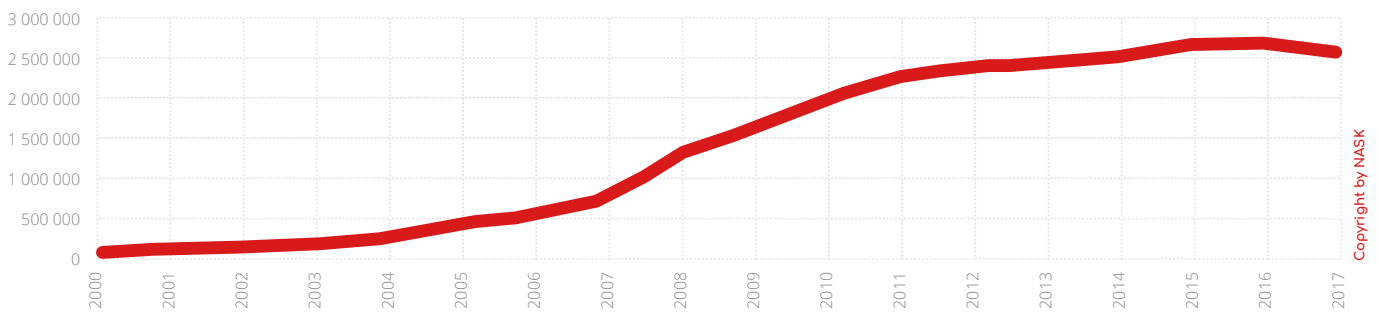


24 November - highest number of .pl domain name registrations - **3 975**



24 December - lowest number of .pl domain name registrations - **610**

Number of .pl domain names in DNS (m)



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Ranking of ccTLD registries

In terms of the number of maintained domain names, .pl registry holds the 10th position in the world and 6th in Europe amongst ccTLD registries.

World

Place	Registry	Number of domain names (m)
1.	.cn China	20.9
2.	.de Germany	16.3
3.	.uk Great Britain	12.1
4.	.nl Netherlands	5.7
5.	.ru Russia	5.4
6.	.br Brazil	3.9
7.	.fr France	3.2
8.	.au Australia	3.1
9.	.it Italy	3.1
10.	.pl Poland	2.6

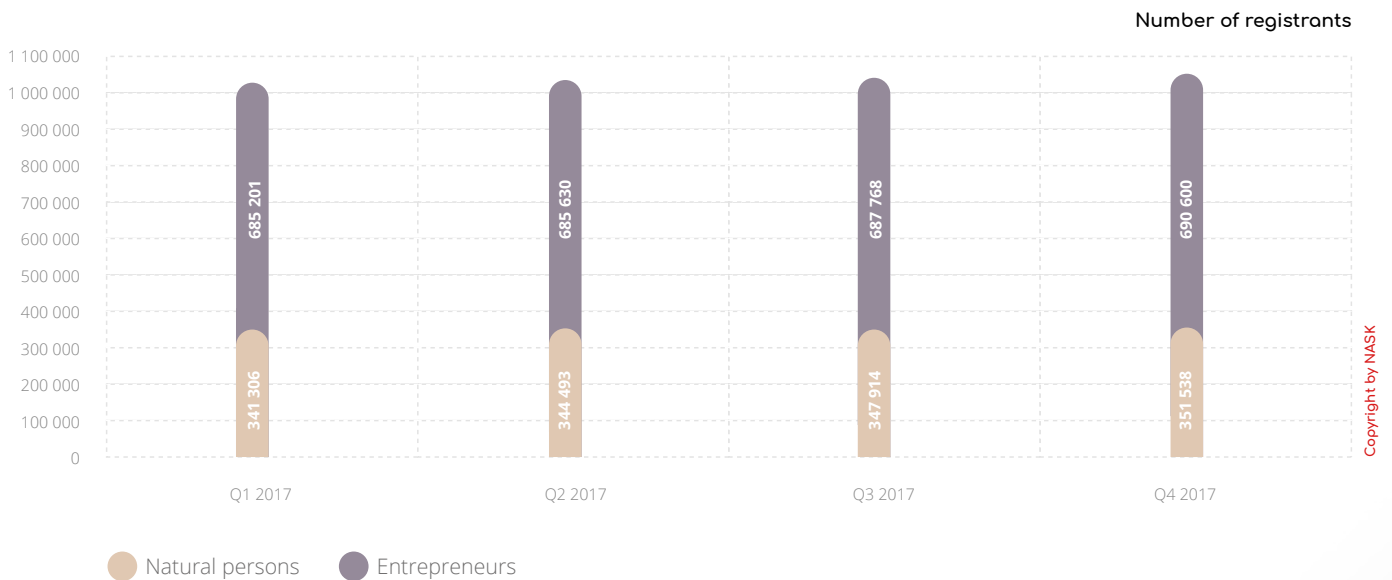
Europe

Place	Registry	Number of domain names (m)
1.	.de Germany	16.3
2.	.uk Great Britain	12.1
3.	.nl Netherlands	5.7
4.	.fr France	3.2
5.	.it Italy	3.1
6.	.pl Poland	2.6
7.	.ch Switzerland	2.1
8.	.se Sweden	1.9
9.	.es Spain	1.9
10.	.be Belgium	1.6

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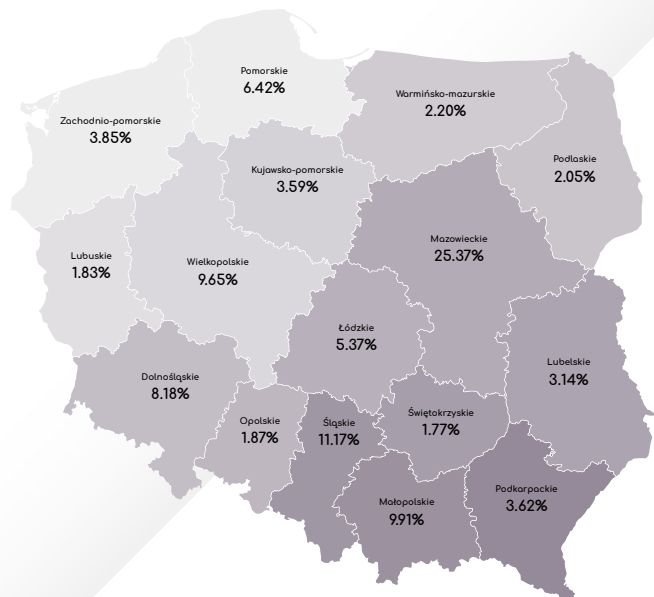
Number of .pl domain name registrants

At the end of 2017, there were 1 042 138 registrants of .pl domain names, denoting the increase by nearly 20 thousand as compared to the previous year. Majority of registrants (ca. 66%) constituted entrepreneurs. However, it is the number of natural persons which grew the most – by 10 thousand registrants. Majority of registrants, over 66.6%, was holding only one .pl domain name, while 15.6% of registrants – two names.

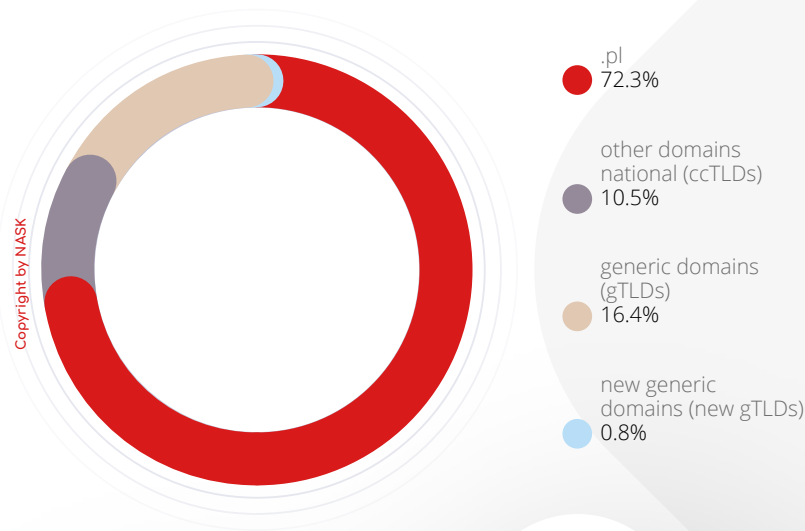


Location of registrants by provinces

The majority of .pl domain name registrants, nearly 94%, was domiciled in Poland. In that group over 25% were domiciled in the Mazowieckie Province. Registrants from four provinces: Mazowieckie, Śląskie, Małopolskie and Wielkopolskie constituted more than a half of all registrants of .pl domain names.



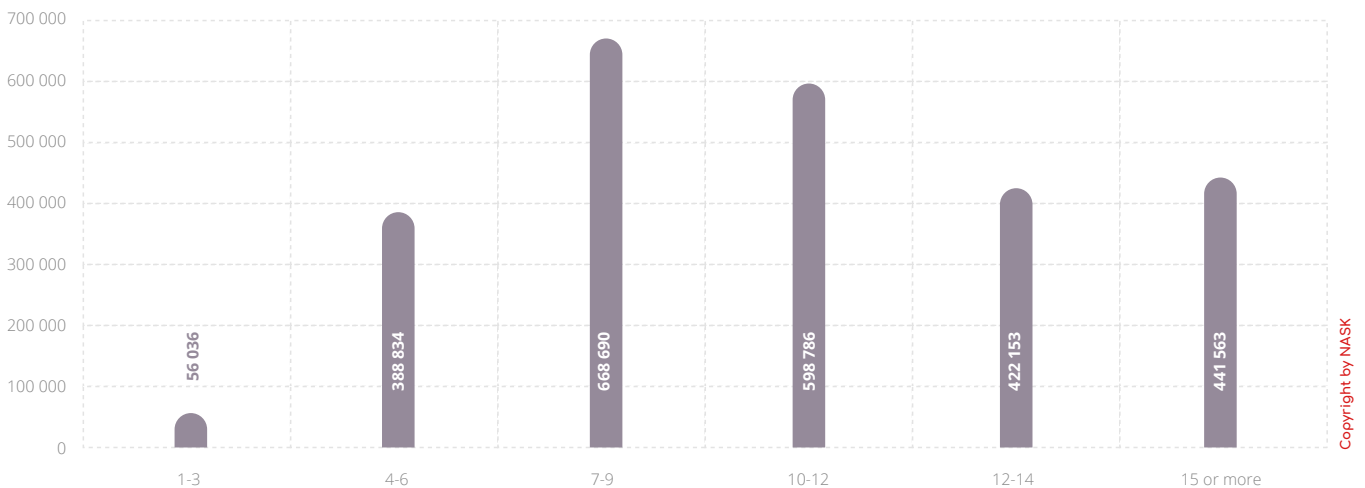
Share of .pl domain in the domain name market in Poland



In Poland, .pl has been a first choice domain for many years. At the end of 2017 its market share amounted to ca. 72.3%, being one of the highest rates in Europe. It means that for the majority of internauts in Poland the country code domain is their first choice. Internet users have got used to the fact that Polish firms or foreign entities, running business in Poland, choose names with a „Polish ending“.

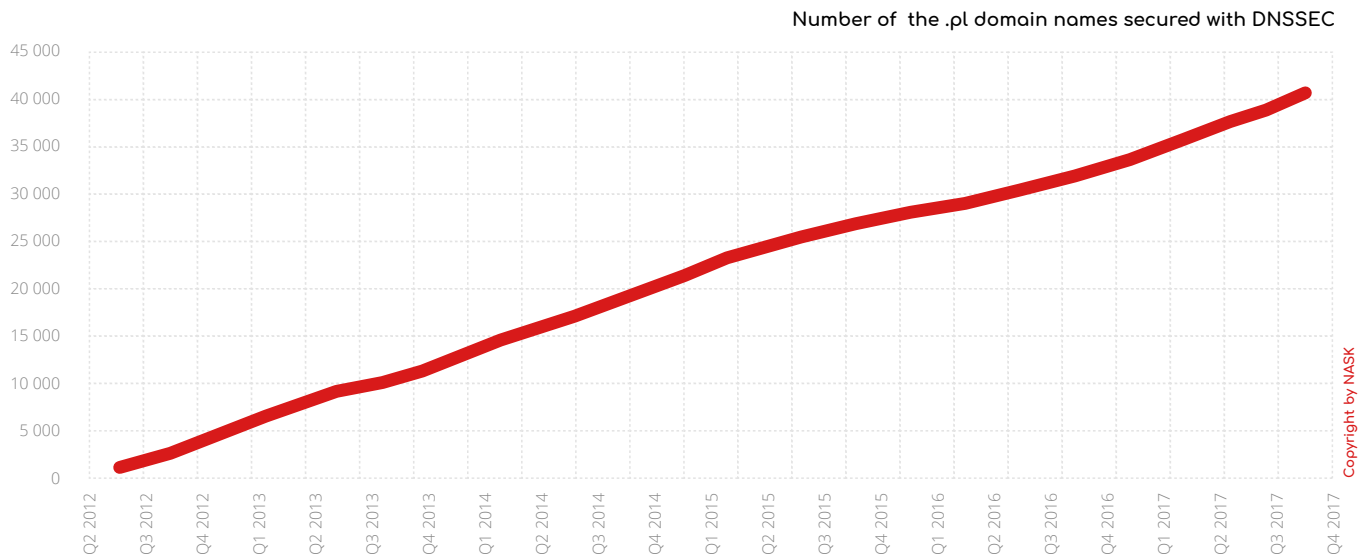
Number of characters in .pl domain names

In 2017 an average number of characters of a .pl domain name amounted to 11. That number has not changed for last few years. The most numerous group of names is that consisting of 9 characters – nearly 229 thousand. There are only 10 names consisting of a maximal number of characters in the .pl domain, i.e. 63.



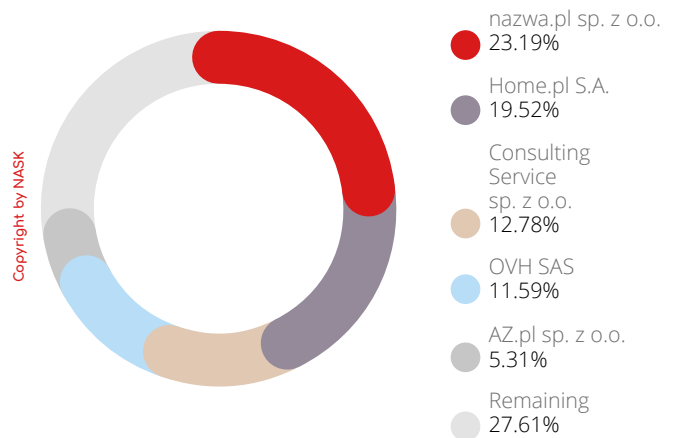
DNSSEC – number of secured .pl domain names

At the end of 2017 there were 40 679 .pl domain names secured with the DNSSEC protocol. In comparison with the previous year their number was by 28% higher. Majority of those kind of domain names was registered and serviced through OVH.



Share of registrars in respect of the number of .pl domain name registrants

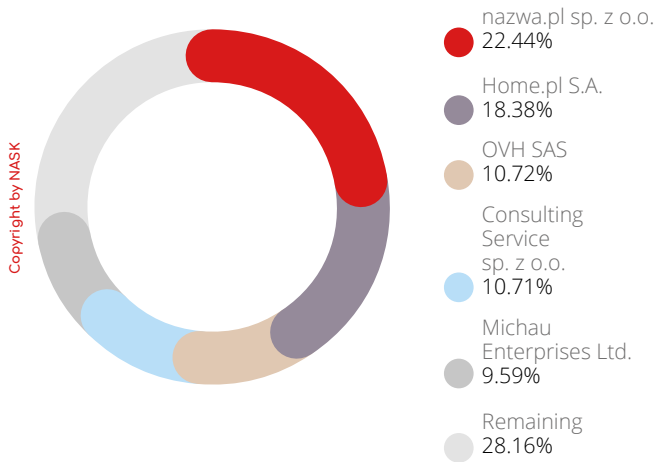
Five biggest registrars, at the end of 2017, were servicing over 72% of registrants of .pl domain names. The leader was nazwa.pl, servicing more than 246 thousand entities (over 23% market share). According to that breakdown the second place took Home.pl (over 19.5% market share), while the third was occupied by Consulting Service (nearly 12.8% market share).



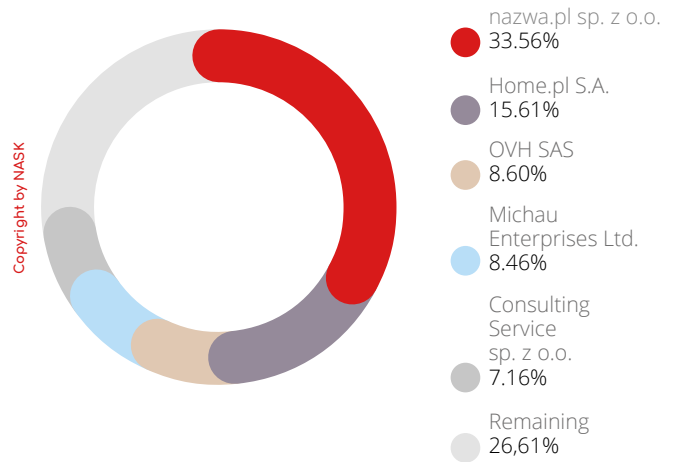
Share of registrars in respect of the number of .pl domain names

2017 brought a significant shuffle in the list of biggest registrars of .pl domain names. Nazwa.pl took a leading position, pushing home.pl to the second place. OVH moved up in the ranking to the third place due to the highest growth (nearly 12%) amongst 10 biggest registrars.

Market share between Partners considering .pl domain names, 2017



Market share between Partners considering new .pl domain name registrations, 2017



Ranking of registrars in respect of the number of maintained .pl domain names

Registrar	end of 2017	end of 2016	growth	growth (%)
nazwa.pl sp. z o.o.	578 181	555 027	23 154	4.2% ▲
Home.pl S.A.	473 590	651 993	-178 403	-27.4% ▼
OVH SAS	276 141	246 817	29 324	11.9% ▲
Consulting Service sp. z o.o.	275 996	272 968	3 028	1.1% ▲
Michau Enterprises Ltd.	246 927	236 298	10 629	4.5% ▲
AZ.pl sp. z o.o.	112 785	133 012	-20 227	-15.2% ▼
Premium.pl sp. z o.o.	76 703	83 579	-6 876	-8.2% ▼
Agnat sp. z o.o.	72 909	73 312	-403	-0.5% ▼
Dinfo Systemy Internetowe	61 791	62 750	-959	-1.5% ▼
Domeny.pl sp. z o.o.	37 389	34 909	2 480	7.1% ▲









WHOIS – statistics of queries

In 2017 the WHOIS database recorded on average ca. 46 million queries monthly. About 2.5% of queries pertained to names related to popular topics such as blockchain and cryptocurrencies. At the end of the year even higher interest in this field was observed – the rate of such queries increased, in the fourth quarter, by 20%.

Transfers of .pl domain names

In 2017 there were performed almost 136 thousand transfers of .pl domain names, i.e. over 11 thousand monthly. It means that registrants of only 5% of names decided to change their service provider. That number dropped as compared to 2016 when the amount of transfers totalled nearly 158 thousand.

Activity of .pl registry in 2017

-  **January 2017**
ICANN DNSSEC workshop, Warsaw
-  **February 2017**
CENTR Administrative workshop, Warsaw
-  **April 2017**
DNSSEC workshop for NASK Partners, Warsaw
-  **May 2017**
Seminar of Arbitrators and Mediators of the Court of Arbitration for the Internet Domain Names at PIIT, Katowice
-  **May 2017**
CENTR Jamboree, Frankfurt
-  **October 2017**
CENTR Registrar Day, Brussels
-  **October 2017**
CENTR Marketing workshop, Zagrzeb
-  **November 2017**
IGF Poland - The Central European Internet Governance Forum, Warsaw

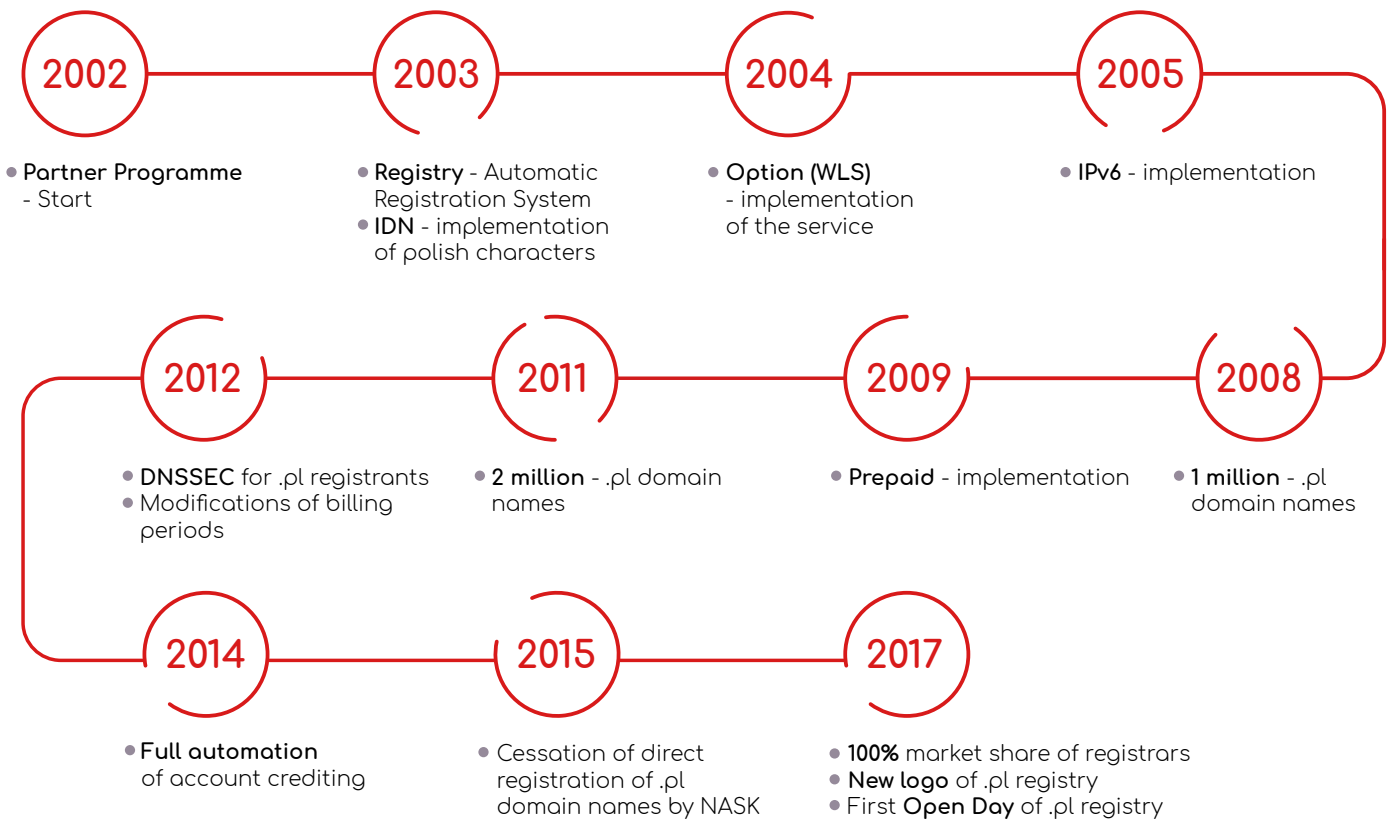
In 2017 NASK and the .pl registry actively contributed to the development of the Internet and domain market both on the international stage and during many domestic initiatives. In February the registry was a host of the CENTR (Council of European National Top-Level Domain Registries) Administrative workshop for ccTLD registries and in November a co-organizer of IGF Poland - The Central European Internet Governance Forum. The .pl registry jointly with ICANN organized also a DNSSEC training and DNSSEC workshop for registrars and participated in the 5th Seminar of Arbitrators and Mediators of the Court of Arbitration for the Internet Domain Names at the Polish Chamber of Information Technology and Telecommunication (PIIT).



15 years of the Partner Programme

The Partner Programme was established in 2002 as a cooperation offer of the .pl registry. At first the offer was targeted mainly at entities, experienced in the domain name sector, among others, organizations that had previously supported end customers in using direct registration and .pl domain name maintenance services at NASK. Among main assets of joining the Partner Programme at its beginnings it was the ability to register and maintain domain names fully automatically by means of EPP that was found most innovative. Furthermore, entities, bound by the Agreement* with NASK, have been offered with a bulk pricelist, while the Registrants with services accessible only to registrars, e.g. OPTIONS, from the very beginning, which have beneficially influenced the registrars' offer. At the same time, first and foremost it may be assumed that it is a complex package of services, e.g. hosting, e-mail, www, that constitutes a driving force of increasing the number of registrars and names serviced through the partner channel which has been impacting the pace of developing the cooperation based on the registry-registrar model.

Entities interested in cooperation with NASK should take into account the quality of self and independent management of domain names enabling to prepare an individual and competitive offer. At the same time, cooperation with NASK involves support for the participants of the Partner Programme both at the stage of testing the registrar's system and later during the live activity. Among advantages of the service worthy of note is a dedicated account manager supporting a registrar with proper solutions during everyday tasks by e-mail or phone. Information necessary to develop or adapt the system registrars may find in the technical documentation available in the logged in registrar's panel. Furthermore, the Partner Programme section enables crediting a prepaid account by means of online payment services and provides a panel with reports, i.a. on transactions. More details on the terms and conditions of cooperation have been provided in the summary, while the milestones of the 15-year history of the Partner Programme have been presented in the timeline.



Since the establishment of the Partner Programme, NASK, as a .pl country code registry, has been consistently caring for provision of highest quality service of Partners using 24/7 uninterrupted access to the main .pl registry. NASK makes also best efforts within the scope of quality service and rights of Registrants. Since the beginnings of the Partner Programme we have been keen on maintaining a dialog with Partners in matters essential for cooperation, which we treat responsibly, therefore we base on consultancies with Partners. At least once a year, a meeting for NASK's Partners is organized, last time, i.e. in 2017, it was held in a form of an Open Day of the .pl registry with the agenda enabling a vivid and constructive panel discussion. In NASK there are organized dedicated technical workshops, highly evaluated by registrars' representatives, conducted by professionals, e.g. in field of DNSSEC.



Marketing communication of .pl registry

In 2017 the registry presented a new logo and a coherent corporate identity. Registry's Partners were also presented with a marketing strategy aiming to strengthen the position of the .pl domain and actively support registrars' communication with the market as well as to promote information and education activities stimulating the development of the domain name market in Poland. Activities in 2017 were targeted both at the Partners (through meetings and workshops) as well as at potential and current registrants. Communication was realized, among others, through social media (registry's profile on Facebook and a YouTube channel). Out of many planned educating animations to be published on YouTube, the first was presenting the DNSSEC solution.



Insight into .pl registry – overview

In 2017 we started a series of interviews “Insight into .pl registry” conducted with NASK’s experts. Our professionals have been sharing their knowledge and opinions on key topics from the domain names market.



Q1 *Why should I care about DNSSEC? – Interview with Maciej Andziński, DNS Specialist in the .pl registry*

“(…) information in DNS, secured with DNSSEC, has a digital signature, therefore the verification of that information is possible. For an average internaut this technical slang means that, for example, after entering the address of their bank in a browser, they may be sure that in fact the website of that bank will be opened, not a website of a criminal who wants to steal their money.”

“(…) we may distinguish several outstanding domain registries, e.g. .nl (Netherlands), .no (Norway), .cz (Czech Republic), where the percentage of signed domains fluctuates at around 50% and more. In Poland this rate amounts to only over 1% with almost all of domain names, secured with DNSSEC, being registered by foreign NASK’s Partners.”

“I would recommend the implementation of DNSSEC to every domain name holder. First of all, this technology should be attractive for entities particularly exposed to hacker attacks, e.g. banks or online shops.”

„The Internet plays more and more significant role in our lives and more and more daily matters are moved to a virtual reality. In consequence, the issue of providing security and privacy in the Internet has become a matter of pressing concern. The asymmetric cryptography lends here a hand and encryption of transmission in the Internet slowly becomes a standard. While implementing the mechanisms of asymmetric cryptography, DNSSEC perfectly fits into that trend.”



Q2 *Who wins disputes on domain names? – Interview with Ireneusz Matusiak, Ph.D., President of the Court of Arbitration for the Internet Domain Names*

“Courts of arbitration are part of the arbitration judicial system, competitive with the system of common courts.”

“Anyone, who considers that other entity, using a .pl domain name, has infringed their rights, among others, intellectual property rights (e.g. trademark protection rights) and civil rights (e.g. personal interest, company name), may obtain a decision of the Court of Arbitration confirming the infringement of those rights.”

“I can proudly admit that the arbitrators and mediators of our Court of Arbitration are individuals combining theoretical knowledge as well as business experience. Those are not only persons with academic degrees but also legal practitioners who on daily basis help different entities running their business.”

“A .pl domain name is not a thing, therefore a property right does not apply in the meaning of regulations pertaining to e.g. houses or cars. We may only refer to a group of entitlements and obligations resulting out of the agreement on .pl domain name maintenance concluded in respect to services provided by the Registry and a Registrar.”



Q3 *How should the administrator respond and why their response is vital?*
– Interview with Martyna Różycka, leader of the Illegal Content in the Internet Response Team – Dyżurnet.pl

“The Dyżurnet.pl team is obliged to respond to reported cases of publishing in the Internet illegal content, in particular regarding sexual abuse of children. We frequently turn to administrators, drawing their attention to harmful content, legal or illegal, and ask them to remove it, change the category or insert a warning.”

“The effectiveness depends on administrator’s response time, i.e. the faster response the shorter adverse content is accessible online and the more limited is its further distribution.”

“During the third quarter of 2017 we contacted administrators 232 times while, at the same time, we reported 31 cases to the Police and 552 cases to our INHOPE association. It shows how important effective cooperation is.”

“Dyżurnet.pl acts for creating secure Internet, therefore it is essential to promote knowledge on that subject among the youngest users. At our website <https://dyzurnet.pl/> we publish articles on current issues such as internet blackmail against children and youth.”



Q4 *Normality in organizations, i.e. how to harness ISO.* – Paweł T. Goławski, DNS Project Management and Business Analysis Team Leader in the Domain Department, NASK PIB’s Quality Assurance Manager

“The final decision on launching in the .pl registry the implementation of the quality management system in compliance with ISO 9001 standard was made at the highest level of NASK in August 2002. (...) the underlying will to improve processes and facilitate the quality of services was a key factor that moved us to implement that system.”

“The adopted policy obliged us to accomplish highest possible level of customer satisfaction, to aim to attain lowest possible level of errors and to improve the cooperation with Registrars which started to be referred to as strategic accounts of NASK.”

“In the .pl registry, process flows, procedures, manuals or forms have been developed by us and on our own in accordance with our need and experience, so as it is legible, transparent and comprehensible to each employee.”

“NASK introduced new quality in the world of domain service, since we were the first ccTLD registry worldwide to obtain a certificate of conformity of the quality management system to the requirements of ISO 9001 standard, what happened in March 2004.”

“A quality system may be implemented at any moment and at any level of organization development, since even in properly operating organizations it is always something to improve. One of the requirements of ISO 9001 standard is continual improvement, and it cannot succeed without systematic identification of changing customer’s expectations and analysis of the efficiency of the quality system as well as completion stage of those expectations.”

Internet? Who rules it?



**Anna
Gniadek**
Team Leader of DNS
Registrar Programme
Development in the
Domain Department
of NASK PIB

The Internet is a medium affecting our lives in a manner that can hardly be defined in straightforward technological terms, and it has been long time since its influence ceased impacting only selected walks of life, e.g. work. To imagine the scale of experience which we, as a mankind, gain everyday using the Internet, it will be helpful to realize what would cause a one hour break in the transmission of data wandering through the net. The first server for transmission of network data was a size of a PC with an attached hand-written note: "Please do not turn off the server". In the beginning of the Internet revolution in the 20th century one could shut down the whole Internet with a one button click.

Currently, there are 7.5 billion people in the world. 3.8 billion of us are Internet users, that is, more or less, half of humankind. 83 million people are born every year, while the number of Internet users increases definitely faster – over 354 million annually. Every hour we send more than 11 billion e-mails. The amount of data created and journeyed through the net is overwhelming. We would need two days to trace non-stop all the information appearing in the Internet within only 3 seconds.

The Internet Corporation for Assigned Names and Numbers (ICANN), managing technical network parameters, digital transport and traffic addressing, is responsible for functioning the Internet in respect of the security maintenance, stability and interoperability. It is not the only organization aspiring to lay down rules in the Internet. Global corporations, such as Facebook or Google, having at their disposal enormous capital in the digital market, also strive for the area of influence in shaping regulations and controlling the Internet. Objectively, users should have significant influence on the management of the Internet which has been created as a broad and democratic network. Reasonability of its functioning has been guided by the idea of general access to common good: information and knowledge on achievements of the mankind. Users, confronted with global corporations, have to constantly develop their skills and enhance competences. However, will the maintenance of appropriate competences be enough not to be ejected from the pilot's seat?

An important factor affecting human behaviour in the network is social media. They are a sort of an overlay on the entangling Internet. More than a half of the Internet users are the users of Facebook which makes it the most populated "country" in the world. Social media have tremendous knowledge on our reality and all that surrounds us.

The internet network is a global medium transmitting endless information, therefore the Internet must be regulated. Unquestionably, we are heading for new determinants and limits specifying the freedom of an individual in the Internet. It is an open question what constraints will the Internet user accept.

NASK PIB, within the frames of IGF Poland - The Central European Internet Governance Forum, organized in cooperation with ICANN, takes part in creating an open and multilateral debate on most important challenges and opportunities for the development of the Internet. The climax of the activity of IGF Poland is the annual conference - Internet Governance Forum, the agenda of which was organized in 2017 by more than ten invited entities including regional partners of the Forum, while the participants were representatives of public administration, researchers, entrepreneurs, non-governmental and technical organizations. Discussions pertained, among others, to the free flow of data, concepts on new rules of agents' responsibility for publishing contents as well as digital competences necessary to use the potential of a digital economy.



Text:

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Compilation of data gathered from the .pl domain name registry system:

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