

NASK'S REPORT FOR THE FIRST QUARTER OF 2013

.PL Domain Name Market

Q1 2013

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Dear Readers,

At the end of the first quarter of 2013, the volume of the .pl domain registry amounted to 2 407 387 domain names active in DNS, which were maintained for 883 thousand registrants. During the first three months of 2013, 272 840 new domain names were registered, with daily average registration number of 3 032 names.

Near 71% of all new registrations were effected in the top-level domain, being the best result since 2009. It means that the registration of functional and regional domain names was less popular – in comparison with the previous quarter, their total registration share decreased by almost 4 p.p.

Over 95% of new registrations constituted domain names registered by the registrants from Poland. In this report, it is the first time we have published the statistics on the .pl domain name registration as divided into provinces, which show that the highest number of new registrations (as much as 24%) were performed by the registrants situated in the Mazowieckie Province.

It is worthwhile to note that among ten largest country code domain registrars from the EU area, it is the .pl registry which demonstrates the largest ccTLD share in all the domain names registered by the registrants from a particular country. In Poland, the ccTLD share amounted to 84%, and it was by 5 p.p. higher than in the Belgian registry, holding the second place, and almost 2.5 times higher than in the French registry.

I invite you to get acquainted with the newest report, presenting the data from the .pl domain name registry for the first quarter of 2013.

Michał Chrzanowski

NASK Director

Number of .pl domain names in DNS

The first quarter of 2013 ended with **2 407 387** active .pl domain names in DNS. From the beginning of January till the end of March 2013 the number of the .pl domain names increased by **5 280**.

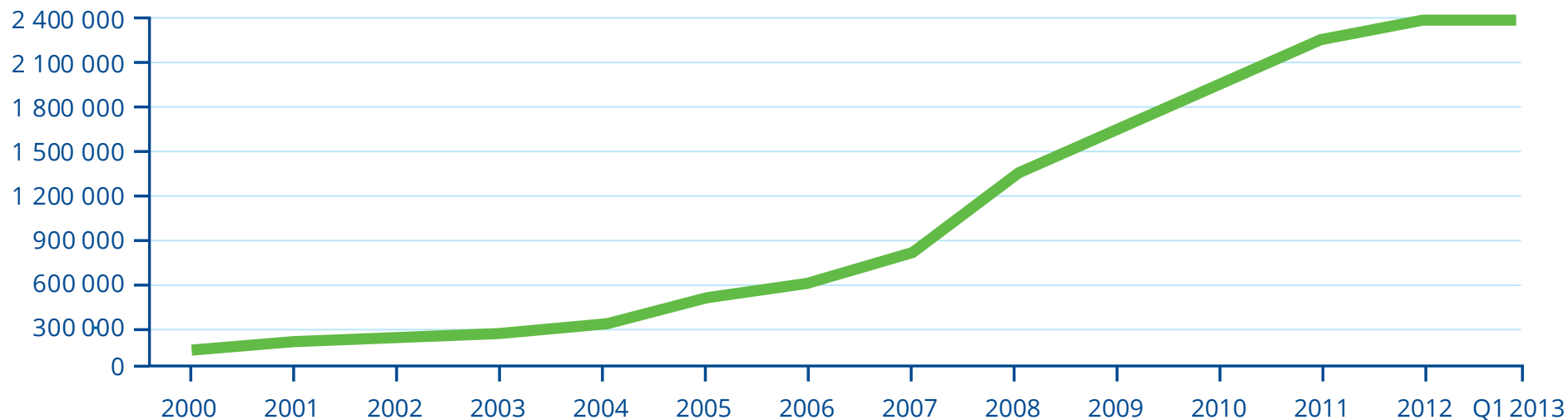
Among all domain names active in DNS, in the first quarter of 2013, **69.72%** were the names registered directly in the .pl

domain, **21.02%** in functional domains, and remaining **9.26%** in regional domains.

With the end of March 2013 in the .pl registry, almost **883 thousand** entries of Registrants of the domain names were active in DNS. **63.91%** of Registrants were entrepreneurs, whereas the remaining **36.09%** constituted natural persons not engaged in any business activity.

Number of .pl domain names in DNS

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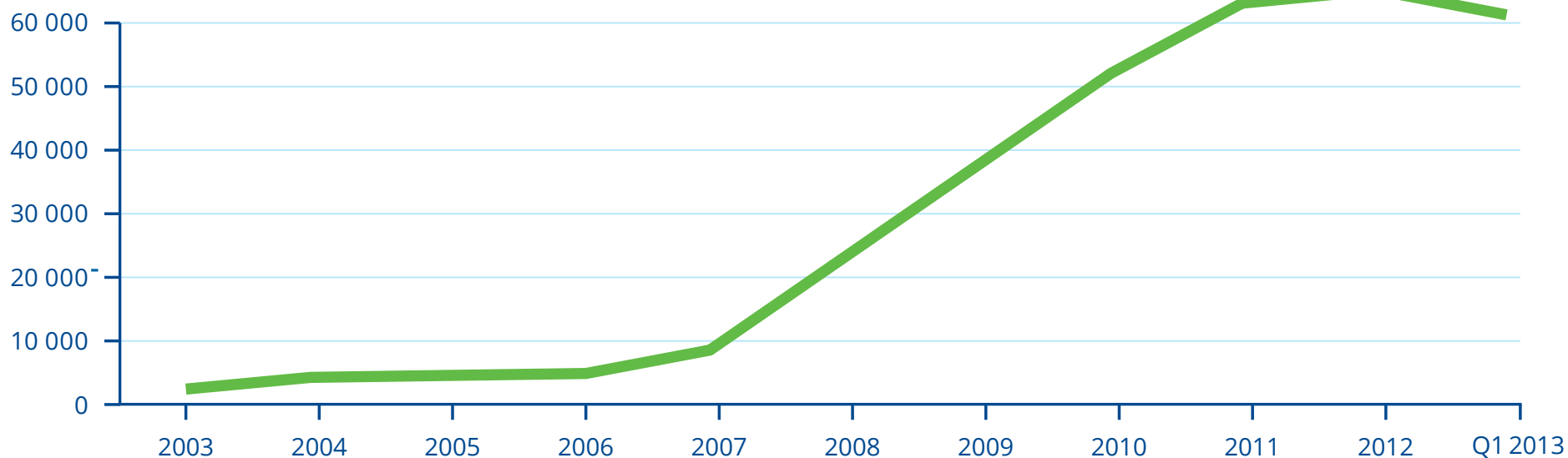


Number of .pl IDN domain names

At the end of March 2013, in the .pl registry there were **62 119** Internationalized Domain Names (IDN) active in DNS. In the first quarter of 2013, the number increased by **5.8%**, as compared with the value representative for the end of 2012.

Number of .pl IDN domain names active in DNS

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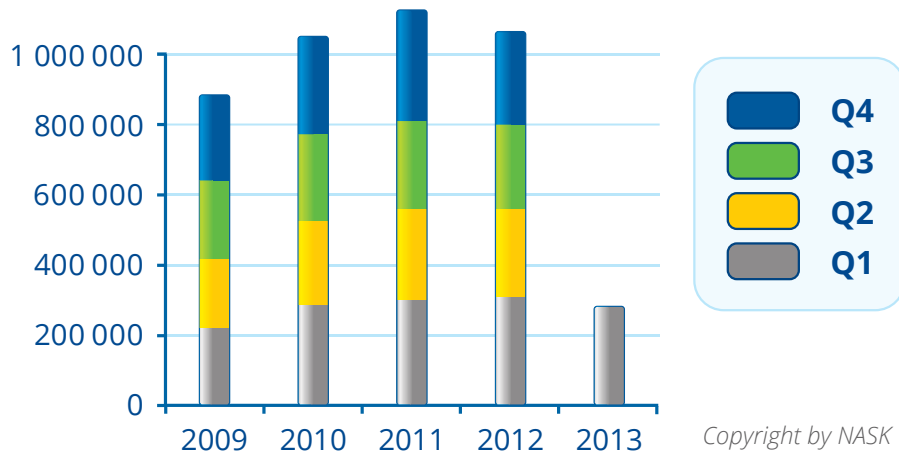


Number of new .pl domain name registrations

In the first quarter of 2013, **272 840** new .pl domain names were registered. The number of registrations in each month of the quarter was as follows: **95 386** in January, **84 650** in February and **92 804** in March. Among all the .pl domain names, **6 816** were the IDN names.

From the beginning of January till the end of March 2013 more than **95%** of all .pl domain registrations were effected for Registrants situated in Poland. In foreign registrations, the most numerous group constituted the Registrants from the United States – **3 528** entries, Germany – **3 092** names and Great Britain – **1 703** registrations.

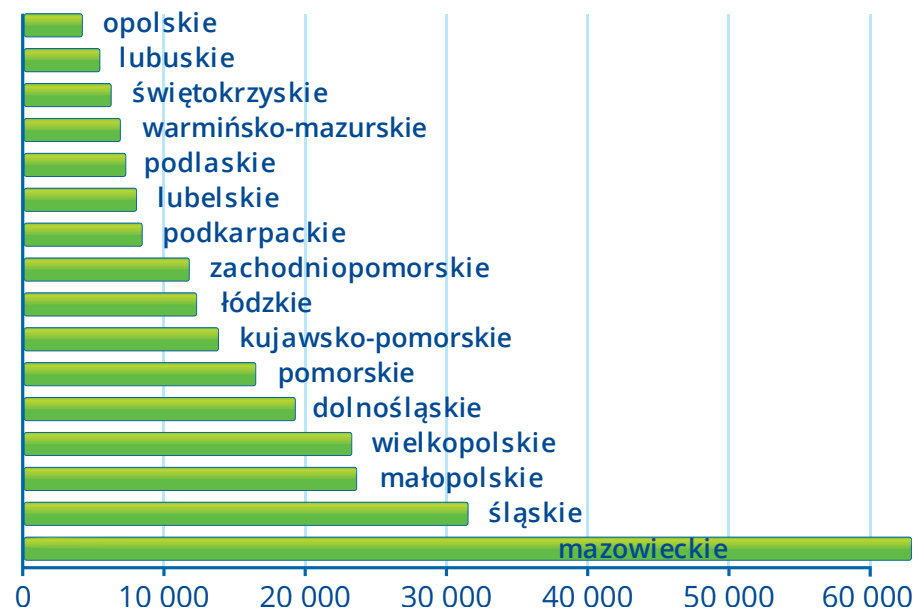
Number of .pl domain name registrations



In case of the .pl domain names newly registered for the Registrants situated in Poland in the first quarter of 2013, the largest group constituted the Registrants from the Mazowieckie Province – **24.01%**, while the lowest number of registrations was noted by the Registrants from the Opolskie Province – **1.16%**.

Number of new domain names to Registrant's place of residence comparison according to provinces, Q1 2013

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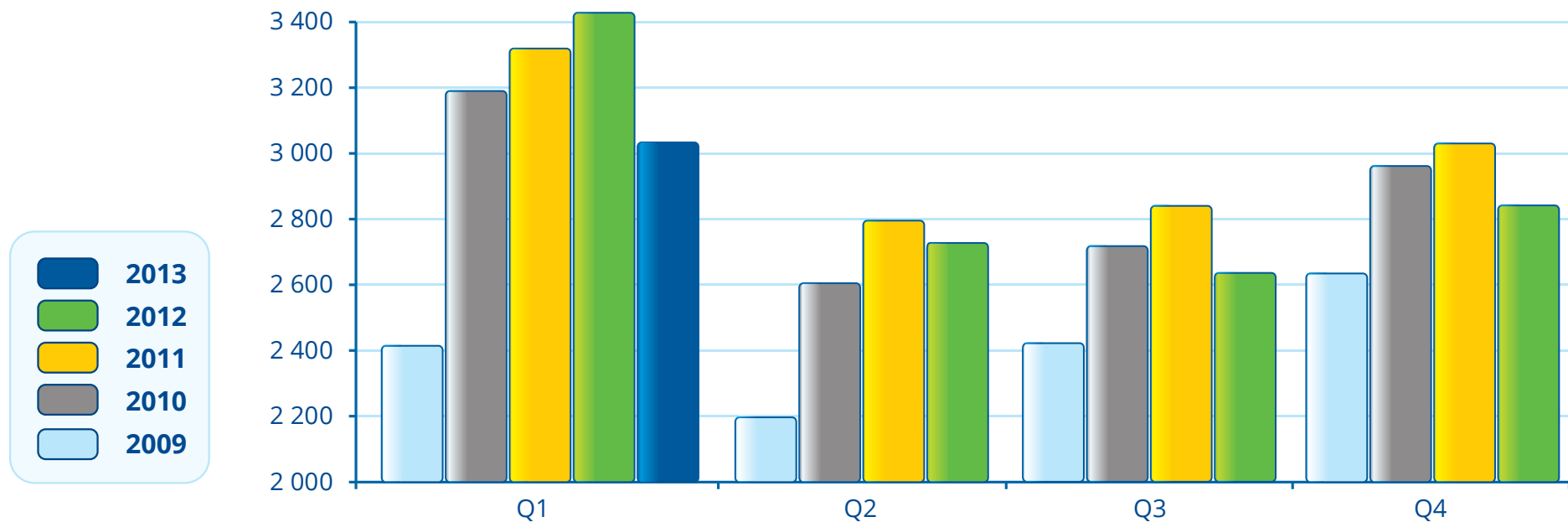
Number of new .pl domain name registrations, daily average

The daily average number of registrations in the first quarter of 2013 increased as compared with the previous quarters and continued the tendency observed since 2010. From the beginning of January till the end of March 2013, daily average **3 032** new

domain names were registered. The largest number of registrations was performed in January, when daily on average **3 077** new .pl domain names were registered, whereas in February and March **3 023** and **2 994** registrations were effected respectively.

Number of .pl domain name registrations, daily average

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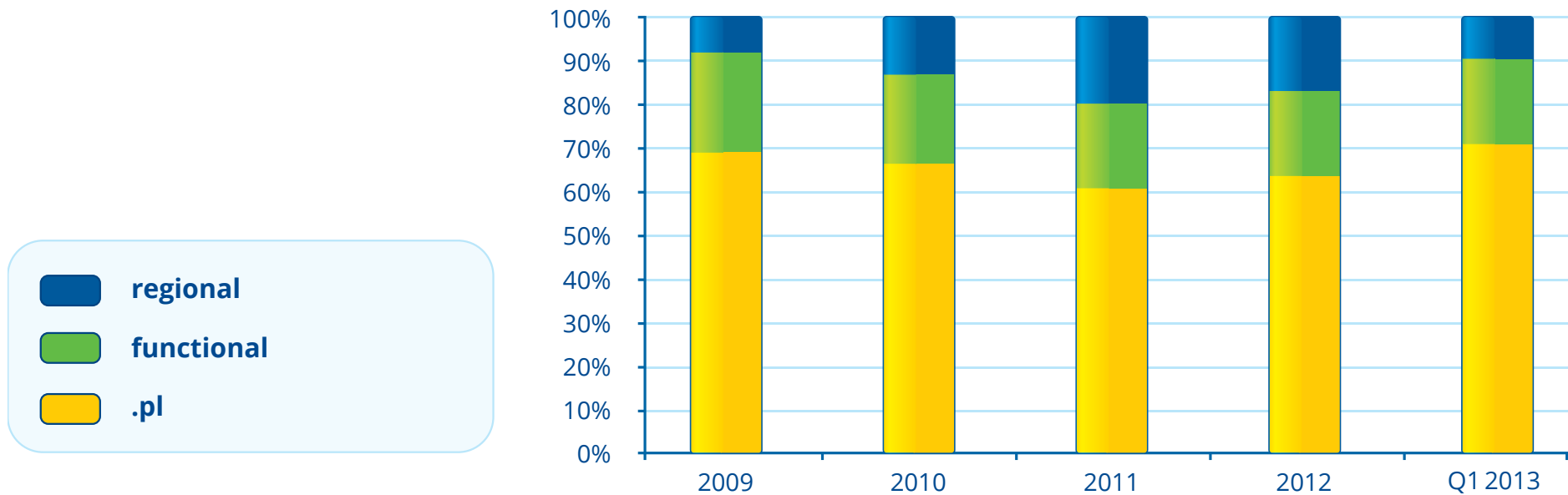
New registrations divided into the type of zone

The number of new second level .pl domain name registrations in the first quarter of 2013 increased by **3.86p.p.** in comparison with the previous quarter, achieving **70.95%**, the best result since 2009. The registration of functional and regional domain names

was less popular, their number decreased by **1.02p.p.** and **2.84p.p.** respectively, accomplishing **19.27%** share in case of functional domain names and **9.78%** share in respect of regional domain names.

Number of new .pl domain name registrations with the division into the type of zone

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Renewal rate of .pl domain names

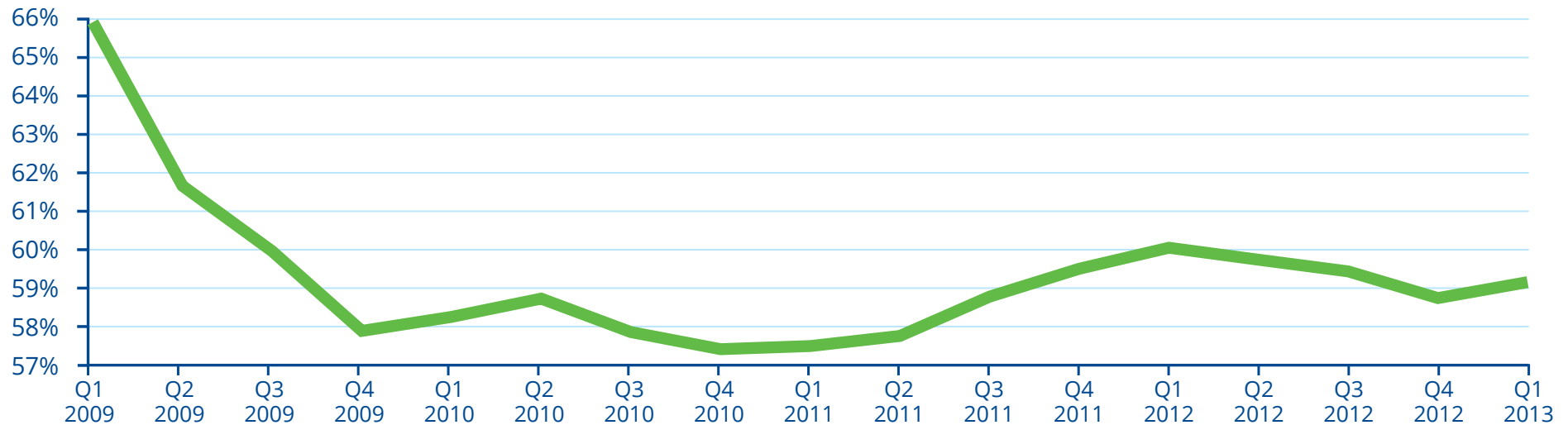
In the first quarter of 2013, more than **400 thousand** .pl domain names were renewed for a successive billing period. In afore mentioned timeframe, the renewal rate slightly increased from **58.96%**, attained at the end of 2012, to **59.09%** at the end of March 2013.

The renewal rate of the .pl domain, calculated at the end of first quarter of 2013, as compared to the registry volume as of the previous year, by account of the names registered in certain years, shows that the longer the domain names remain in the registry, the higher their renewal rates. The domain names registered

in 2012 were renewed in **33.10%**, in 2011 the rate amounted to **73.45%**, in 2010 the result equalled to **79.71%**, whereas the domain names registered before 2010 were renewed in **90.23%**.

From the beginning of January till the end of March 2013, **471** annual billing period shifts of the .pl domain names were effected. The achieved result shows the interest increase in the service launched in April 2012, since in 2012 the service was used in total **397** times. **84.93%** of shifts were performed within the time span from 1 to 60 days.

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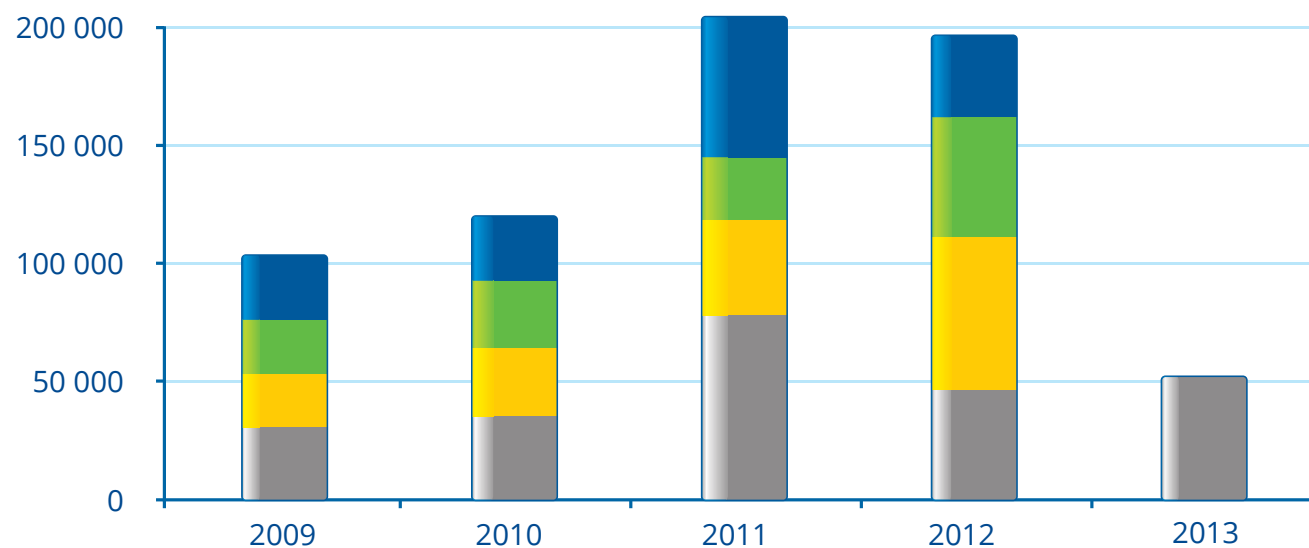
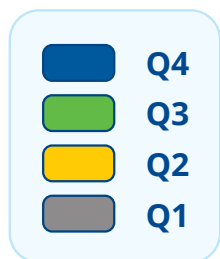
Renewal rate of .pl domain names

Transfers between Partners

Within the first three months of 2013, Registrants executed **50 882** .pl domain name transfers between NASK's Partners. **1 102** domain name service transfers were performed with the simultaneous renewal of the .pl domain name for the next billing period, whereby **681** of them were made after the previous billing period had been completed.

Number of .pl domain name transfers

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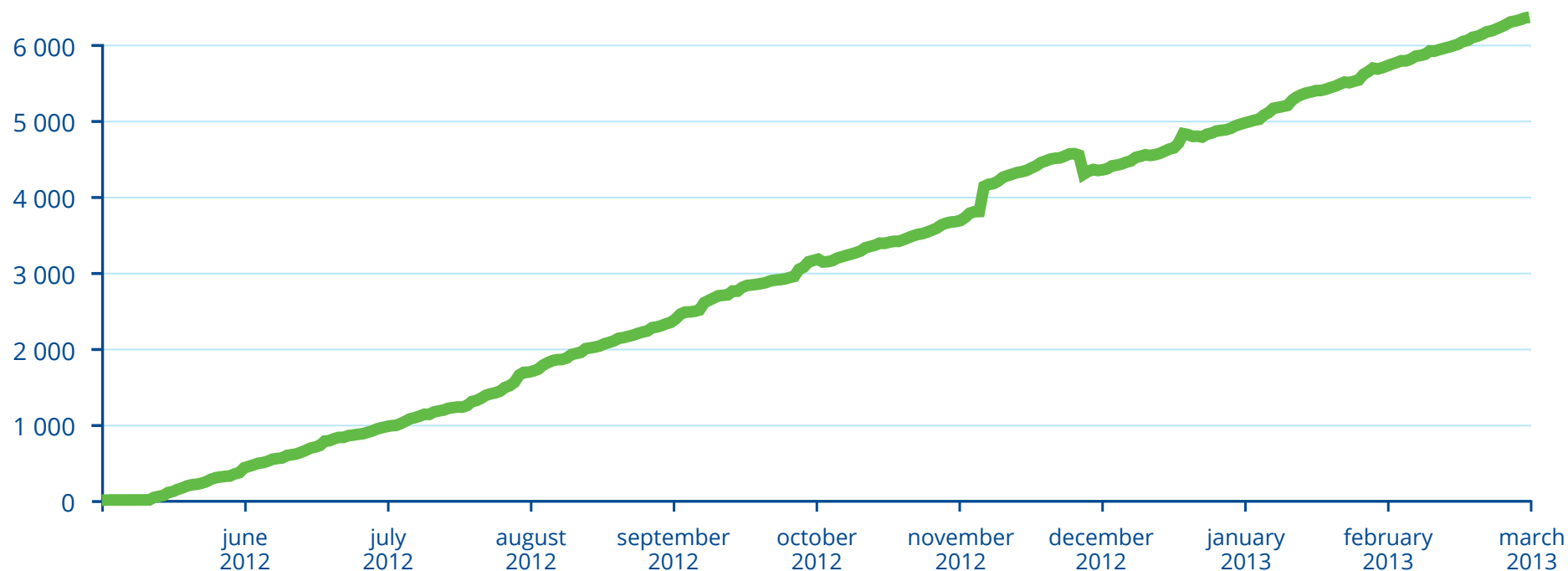
DNSSEC in the .pl domain name

The DNSSEC protocol has been used by Registrants to secure the .pl domain names since 4 June 2012. With the end of March 2013, **6 249** domain names were secured in the .pl registry with the

DNSSEC protocol. Daily average in the first quarter of 2013, the number of secured .pl domain names increased by **21.94** items, which reflected the corresponding number in the previous quarter.

Number of the .pl domain names secured with DNSSEC

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Ranking of ccTLDs from the EU area

With the end of March 2013, the .pl registry was located on the **sixth** place among the largest country code domain registries from the EU area. The first position, with the number exceeding **15 million**, was occupied by the German registry, followed by the British registry with **10 million**. The Dutch, French and Italian registries were situated on successive locations. The registries classified to Top 10, however maintaining fewer domain names than the Polish registry, are Spanish, Belgian, Swedish and Danish.

The division of the domain name market in particular member states shows that the .pl domain names constitute **84%** of domain names - global and ccTLDs registered by inhabitants of Poland. Among ten biggest country code domain registries from the EU area, Poland attained the highest result, followed by Belgium and its .be ccTLD, achieving **79%**. The lowest value, **36%**, was accomplished by the .fr domain name registry, which has been dynamically developing for last few quarters.

Table includes data updated between the 1st and 4th of April 2013.

**Data derives from the CENTR report "DomainWire Stat Report"*

Position	Registry	Number of domain names	ccTLD share in the local domain market*
1.	.de	15 385 565	68%
2.	.uk	10 386 743	60%
3.	.nl	5 208 682	72%
4.	.fr	2 579 969	36%
5.	.it	2 544 518	55%
6.	.pl	2 407 387	84%
7.	.es	1 638 771	43%
8.	.be	1 362 686	79%
9.	.se	1 281 390	66%
10.	.dk	1 221 901	76%

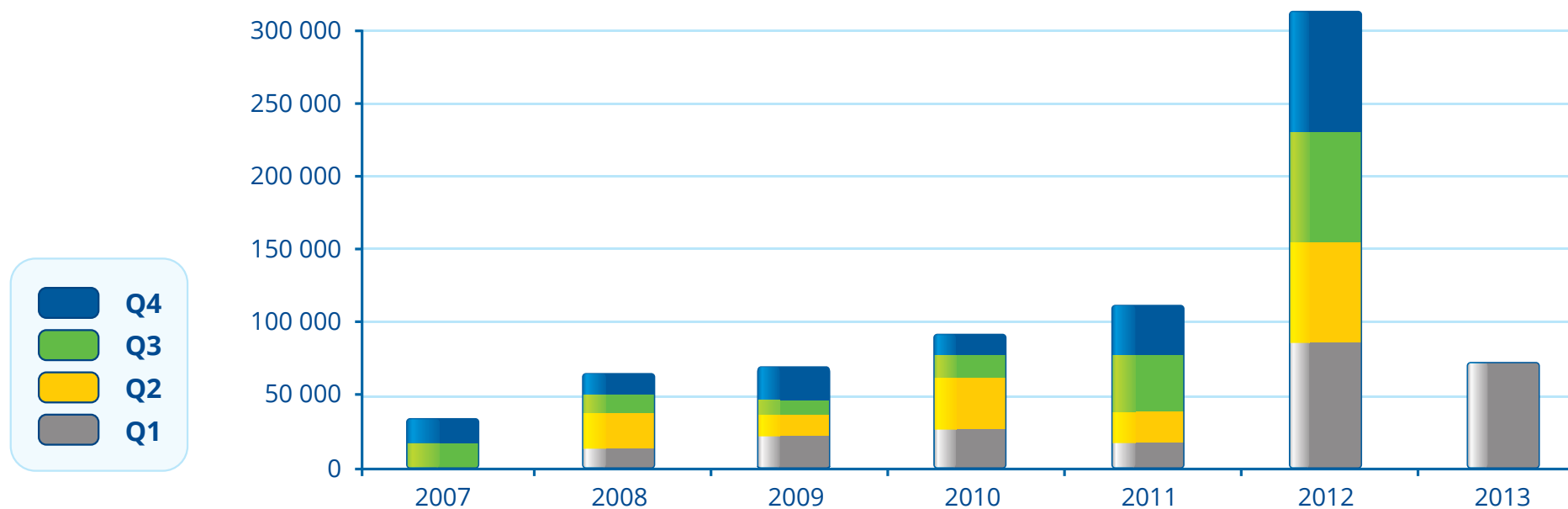
The popularity of testing .pl domain names before their possible registration, in the first quarter of 2013, similar as in the previous year, remained at a high level. In the first three months of 2013, **72 864** domain names were tested, whereby in January **22 103**, in February **24 188** and in March **26 573** domain names. **3.29%** of

the domain names, tested in the first quarter, were registered for a tester.

Since launching the service, i.e. from 1 September 2007, **6.80%** of tests have been completed with the registration of a domain name.

Number of DNT registrations

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WLS

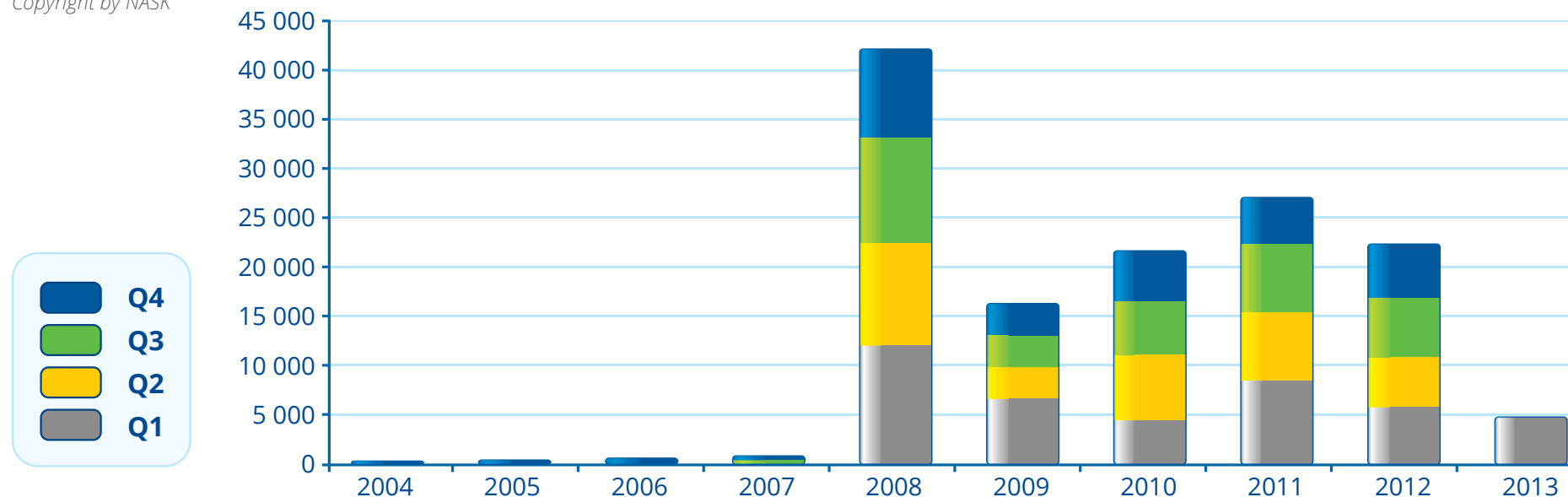
In the first quarter of 2013, **4 624** new agreements on the options for registration of the .pl domain name were concluded. An option provides the option holder with a priority right to register a domain name when its present Registrant resigns from further maintenance thereof. In the first three months of 2013, on the basis of the agreements on options, **2 547** domain names were made available for registration, whereby **2 356** were registered. In case of remaining **191** domain names, the registration did not effect.

In the first quarter of 2013, **188** agreements on the options for registration of the .pl domain name were renewed for a successive 3 year period.

Since the moment of making the option service available, i.e. from 1 June 2004, the .pl domain name registry has concluded over **135 thousand** agreements on the options for registration of the .pl domain name, and in case of **44.39%** of agreements, the registry has provided the .pl domain name for registration.

Number of WLS registrations

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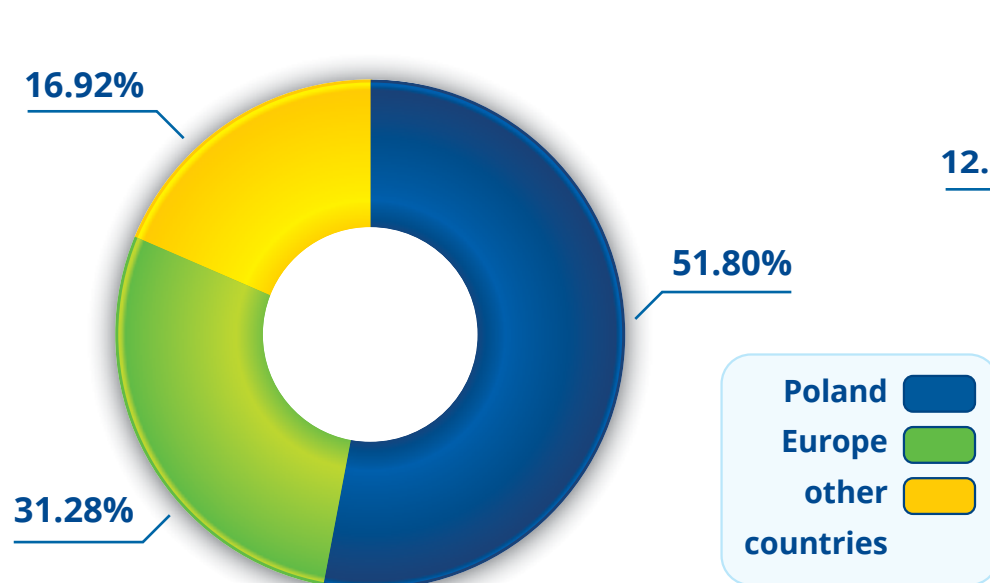


NASK is registering the .pl domain names directly as well as by Registrars, the so called Partners, which have signed a proper agreement with the registry, and representing the interests of Registrants of the .pl domain names, Partners enter the Registrants' data directly to the registry record.

With the end of March 2013, the .pl domain name registry cooperated with **195** Registrars from all over the world. **101** NASK's Partners, maintaining almost **80%** of the .pl domain names active in DNS, had their registered offices in Poland, **61** Partners had their premises in Europe, while the remaining **33** entities were located outside Europe.

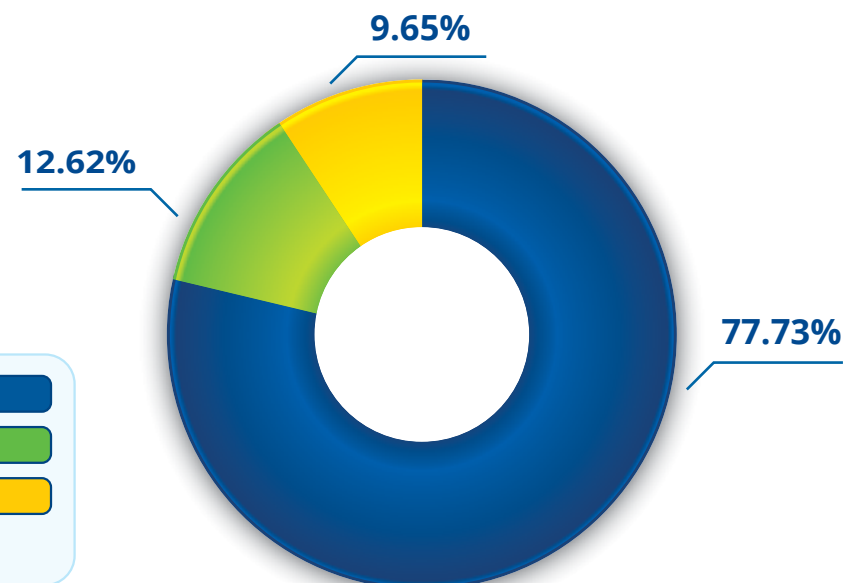
Partners of NASK, division by place of residence, Q1 2013

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The .pl domain name market share between Partners considering the place of residence, Q1 2013

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Market share between Partners considering .pl domain names

With the end of the first quarter of 2013, the NASK's Partners maintained **98.97%** of **2 407 387** .pl domain names active in DNS, whereby the remaining **1.03%** represent the domain names serviced directly by NASK.

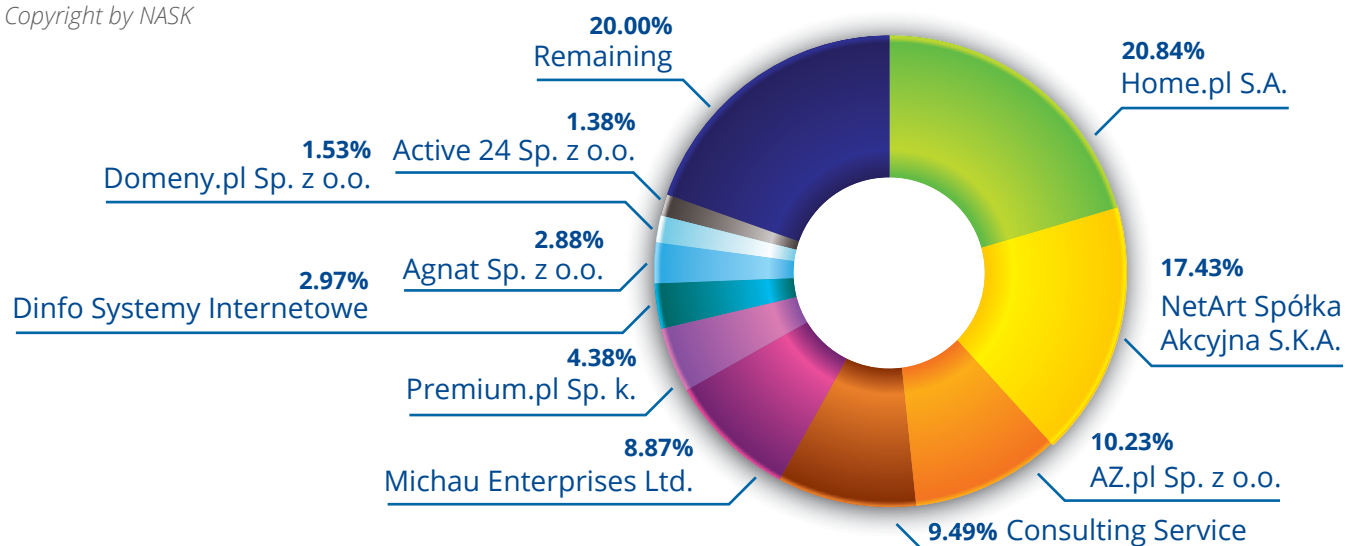
Ten .pl domain name Registrars serviced at the end of March 2013 totally **80.00%** of the market. The first on the list of the biggest Registrars, Home.pl S.A., maintained **20.84%** of active .pl domain names. On further positions were: NetArt Spółka Akcyjna S.K.A.

and AZ.pl Sp. z o.o., maintaining **17.43%** and **10.23%** of active .pl domain names respectively. The remaining Partners from Top 10 with market share below **10.00%** were: Consulting Service, Michau Enterprises Ltd., Premium.pl Sp. k., Dinfo Systemy Internetowe, Agnat Sp. z o.o., Domeny.pl Sp. z o.o. and Active 24 Sp. z o.o.

In the first quarter of 2013, the market share between Partners beyond the TOP 10, considering .pl domain names, increased by **1.12p.p.** and amounted to **20.00%**.

Market share between Partners considering .pl domain names, Q1 2013*

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*The graph presents TOP 10 of NASK Partners that agreed to make their market share data public.

Market share between Partners considering new registrations

99.97% out of 272 840 new .pl domain names were registered in the first quarter of 2013 by NASK's Partners.

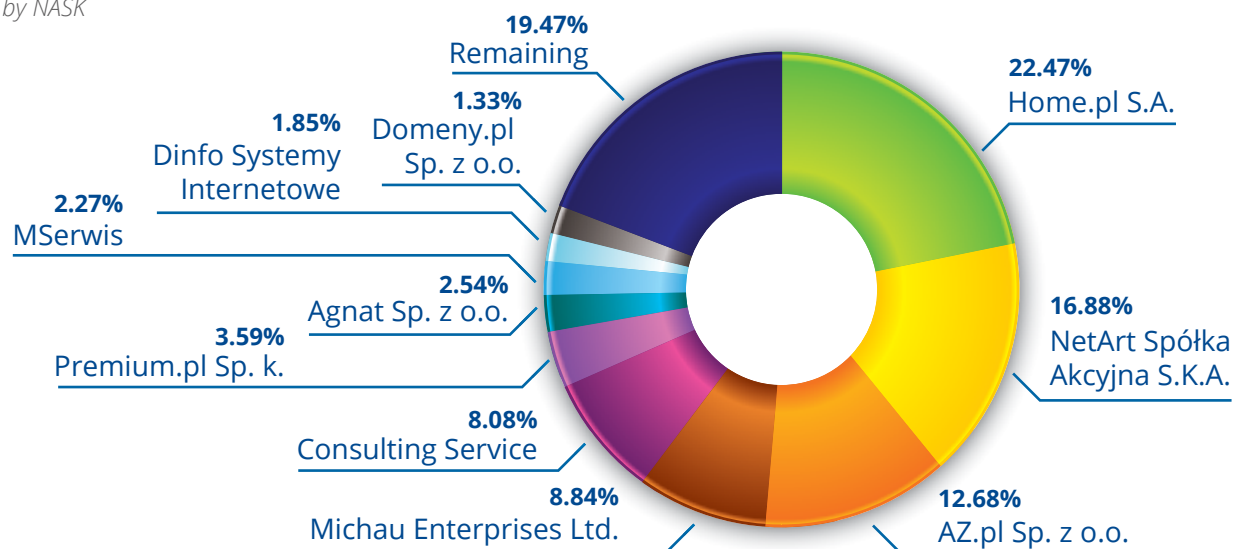
As many as 52.03% of new domain names were entered in the registry by three Registrars: Home.pl S.A. – 22.47%, NetArt Spółka Akcyjna S.K.A. – 16.88% and AZ.pl Sp. z o.o. – 12.68%.

The further most frequently chosen NASK's Partners in the first quarter were: Michau Enterprises Ltd., Consulting Service, Premium.pl Sp. k., Agnat Sp. z o.o., MSerwis, Dinfo Systemy Internetowe and Domeny.pl Sp. z o.o.

The Partners beyond the Top 10 serviced, in the first three months of 2013, 19.47% of all registrations.

Market share between Partners considering new .pl domain name registrations, Q1 2013*

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*The graph presents TOP 10 of NASK Partners that agreed to make their market share data public.

Market share between Partners considering Registrants

At the end of March 2013, NASK's Partners were servicing almost **97.99%** of all Registrants of the .pl domain names active in DNS.

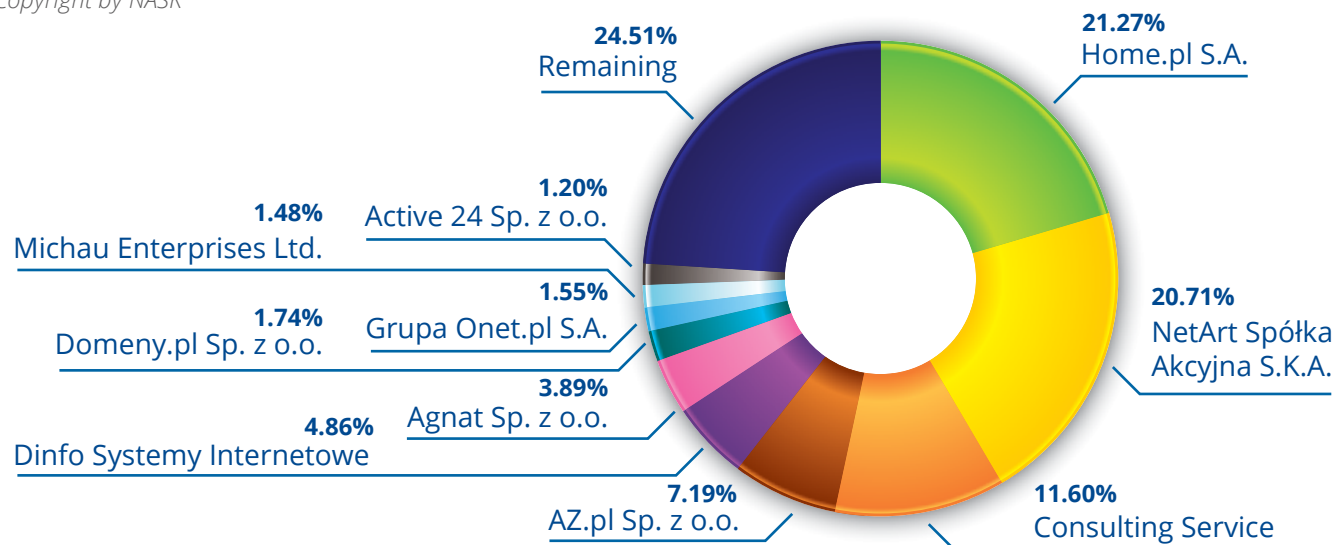
53.58% of all Registrants were serviced by three NASK's Partners: Home.pl S.A. – **21.27%**, NetArt Spółka Akcyjna S.K.A. – **20.71%** and Consulting Service – **11.60%**. In the Top 10 Registrars, servicing the highest number of .pl domain name Registrants, with market

share below **8%**, were AZ.pl Sp. z o.o., Dinfo Systemy Internetowe, Agnat Sp. z o.o., Domeny.pl Sp. z o.o. , Grupa Onet.pl S.A., Michau Enterprises Ltd. and Active 24 Sp. z o.o.

The Registrars outside the presented top ten, in the first quarter of 2013, serviced **24.51%** of Registrants.

Market share between Partners considering .pl domain name Registrants, Q1 2013*

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*The graph presents TOP 10 of NASK Partners that agreed to make their market share data public.

Market share between Partners considering DNT registrations

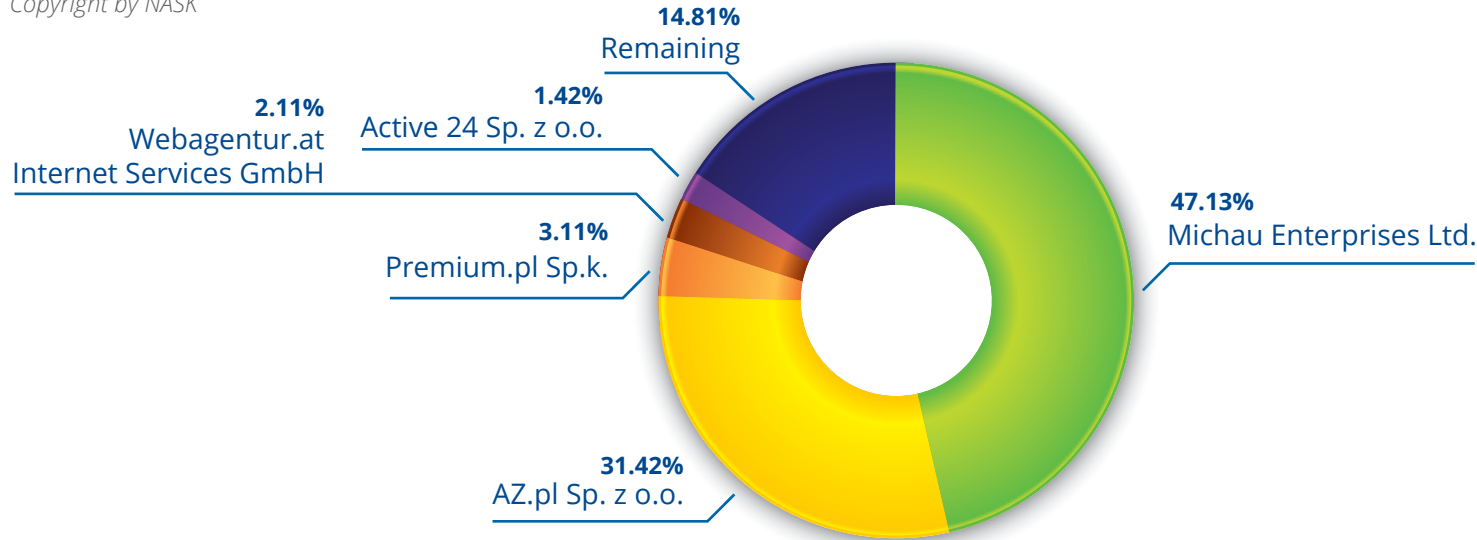
The registrations of .pl domain name tests are carried out only through the NASK's Partners. This market for the last few years has been dominated by two Partners: Michau Enterprises Ltd. and AZ.pl Sp. z o.o. During the first quarter of 2013, with **72 864** tests, Michau Enterprises Ltd. mediated in concluding **47.13%** of .pl DNT contracts and AZ.pl Sp. z o.o. mediated in concluding **31.42%** of

the contracts. The remaining .pl domain name Registrars with highest DNT market share were: Premium.pl Sp. k., Webagentur.at Internet Services GmbH and Active 24 Sp. z o.o.

The NASK's Partners, beyond the presented Top 5, serviced **14.81%** of .pl domain name tests.

DNT market share between Partners, Q1 2013*

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*The graph presents TOP 5 of NASK Partners that agreed to make their market share data public.

Market share between Partners considering WLS registrations

In the first quarter of 2013, options for registration of .pl domain names were most frequently purchased through Michau Enterprises Ltd., which mediated in concluding **2 460** contracts, which constituted **53.20%** of all agreements on the options for registration of the .pl domain name concluded in that period.

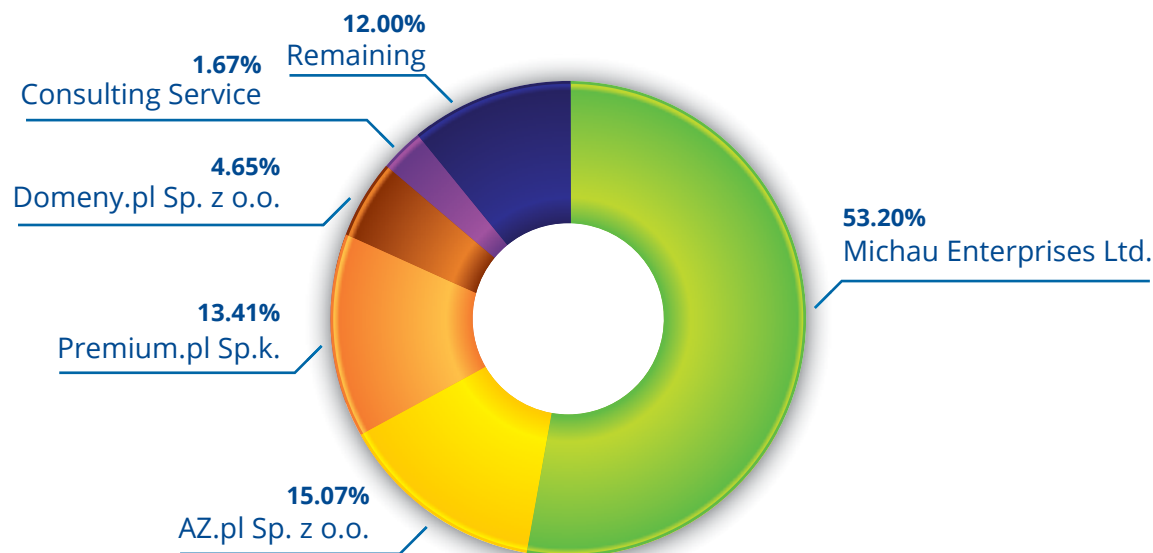
Other NASK's Partners, most frequently chosen by option buyers in the first three months of 2013, were: AZ.pl Sp. z o.o. with **15.07%**

WLS market share, Premium.pl Sp. k. with **13.41%** share, Domeny.pl Sp. z o.o. with share at the level of **4.65%** and Consulting Service having **1.67%** share in the WLS market.

The Partners beyond the presented Top 5 serviced **555** new agreements on the options for registration of the .pl domain name.

WLS market share between Partners, Q1 2013*

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**The graph presents TOP 5 of NASK Partners that agreed to make their market share data public.*