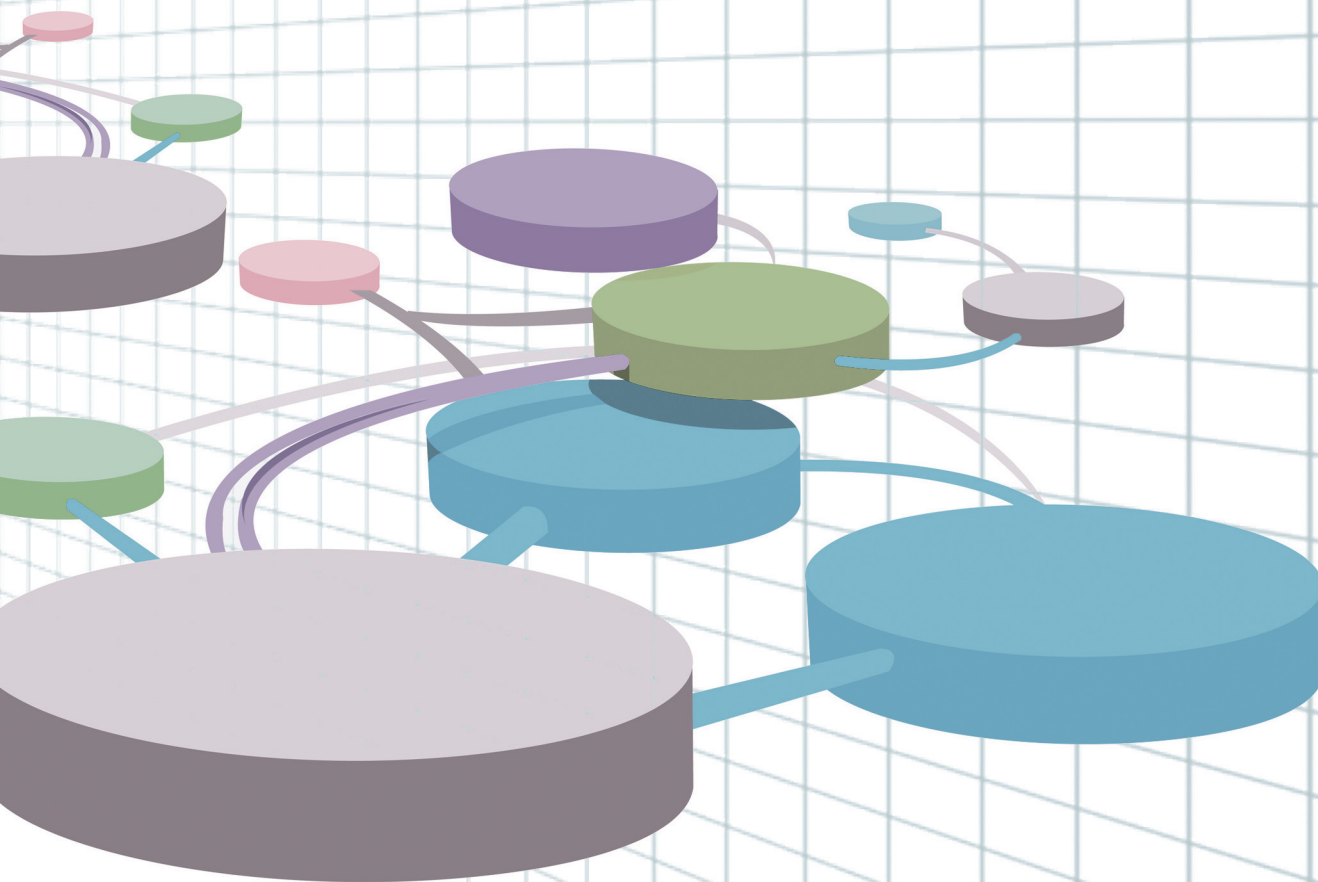


# DOMAIN NAME MARKET IN POLAND Q4 2010

In the last quarter the daily average of new registrations equaled to 2963, while the daily average from the whole year was a bit lower 2861.



# DOMAIN NAME MARKET IN POLAND

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# INTRODUCTION

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Dear Readers,

After a moderate increase period in the third quarter, the last three months of 2010 brought another marvelous result in the field of .pl domain name registration. If new .pl domain name registration is considered, it was the second best such quarter in the history. Unrelenting growth dynamics, still highest in Europe, allows to believe that the year 2011 will be equally successful. One should pay attention at the excellent results noted in December, during the Christmas Holiday as well as at the end of the year 2010. In the final month of the last year 84 253 new domain name registrations were noted, when usually we observed a decline in that regard. Such good results are an outcome of relentless interest in .pl domain as well as actions taken by NASK in promoting the two millionth .pl domain name.

During the year 2010 the DNS grew by 364 000 .pl domain names. In the last quarter the daily average of new registrations equaled to 2963, while the daily average from the whole year was a bit lower – 2861.

Among all the events that happened during the last quarter of 2010, what's worth mentioning is the change in the percentile share of private persons as the new .pl domain name registrants. It amounted to 56 % and its quantity may be attributed to the growing conscience among the Polish Internet users on how important it is to possess a domain name. This tendency fully defines the direction of NASK politics in the area of private persons participation in the .pl domain name registration and conforms the situation observed for a long time in the biggest European registries. This process is also a result of educational and promotional actions, conducted consequently by NASK and some of its Partners. One may be of the opinion that in the near future these actions will result in an even wider interest in .pl domain names among private persons and in turn increase the number of participants of this group in the overall amount of registrants.

An outstanding result in the number of new .pl domain name registrations in the fourth quarter of 2010 is a starting point for actions which are aimed to reinforce the presence of .pl domain name in the Internet. In the fourth quarter of 2010 the number of renewed .pl domain names was equal to 57,65 %. Increasing this value in the upcoming months is NASK's primary goal in the field of .pl domain name registration.

*Michał Chrzanowski*  
NASK Director

**Domain name market in Poland**

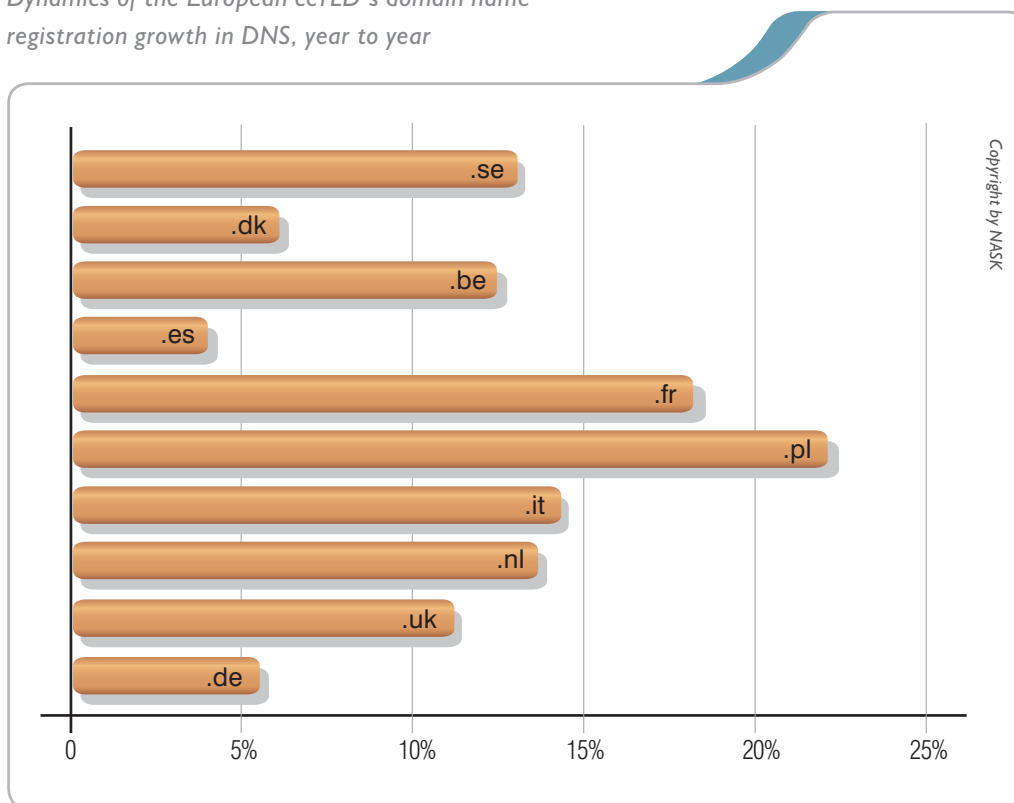
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# DYNAMICS OF ccTLD'S REGISTRATION GROWTH IN THE EU AREA

The Q4 of 2010 was a very prosperous period for most of the European registries when it comes to increase in the amount of active domain names in DNS. Only the .uk registry noted a lowering of the dynamics during these three months. Polish registry, as in the previous quarters, noted the highest gain and is still remaining the leader when it comes to the year to year dynamics.

*Dynamics of the European ccTLD's domain name registration growth in DNS, year to year*



**Domain name market in Poland**

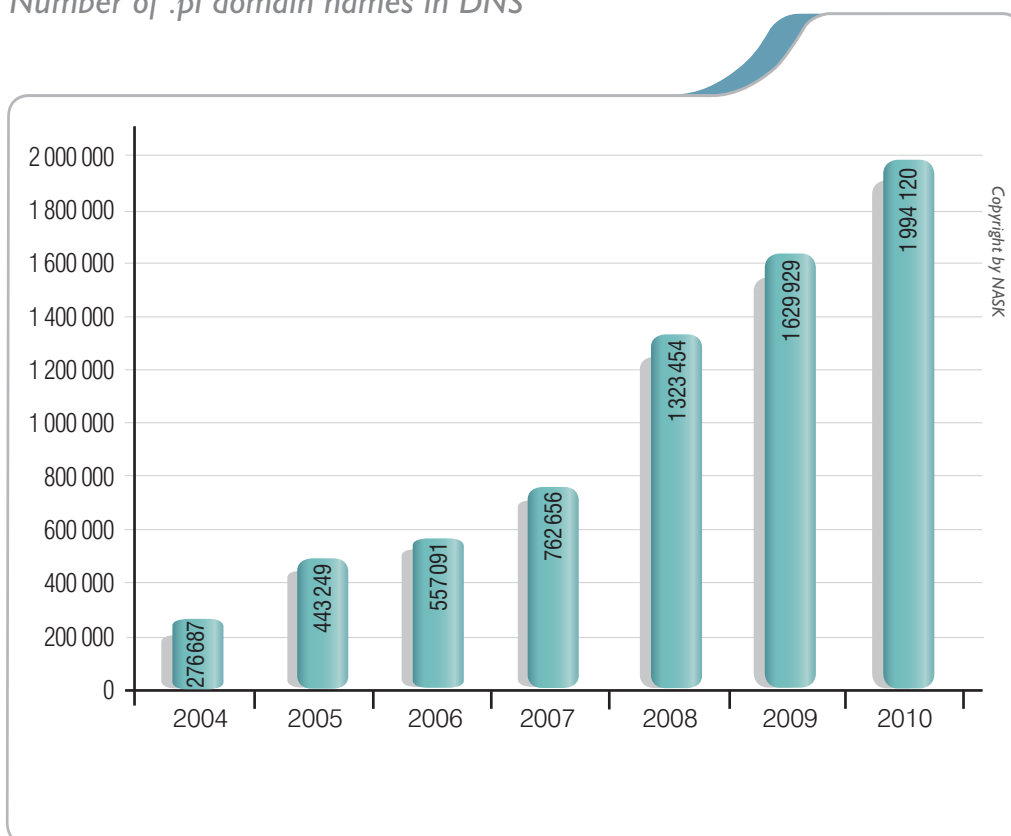
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# NUMBER OF .PL DOMAIN NAMES IN DNS

The number of .pl domain names, active in the DNS at the end of 2010 amounted to **1 994 120**. In the Q4 alone a increase by almost **4,6 %** was noted. During the year the DNS grew by **364 000** .pl domain names.

Number of .pl domain names in DNS



Domain name market in Poland

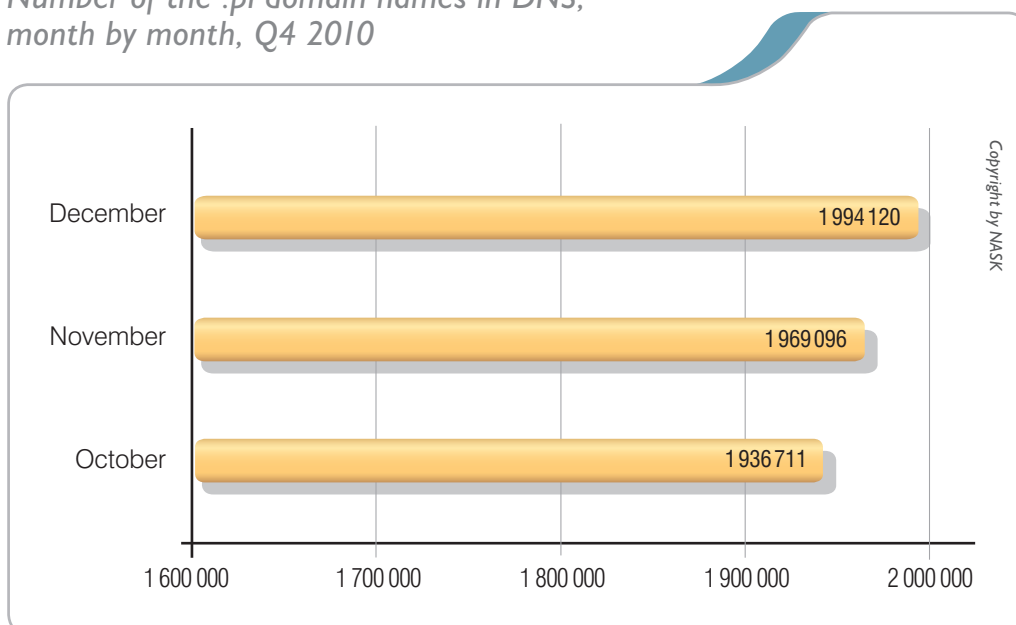
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# FOURTH QUARTER OF 2010 – MONTH BY MONTH

The beginning of Q4 2010 was characterized by a very stable growth of .pl domain names in DNS. In October an increase by **30 280** domains was noted, in November by **32 385** with a mild throttle down in December with **25 024** active .pl domain names.

*Number of the .pl domain names in DNS,  
month by month, Q4 2010*



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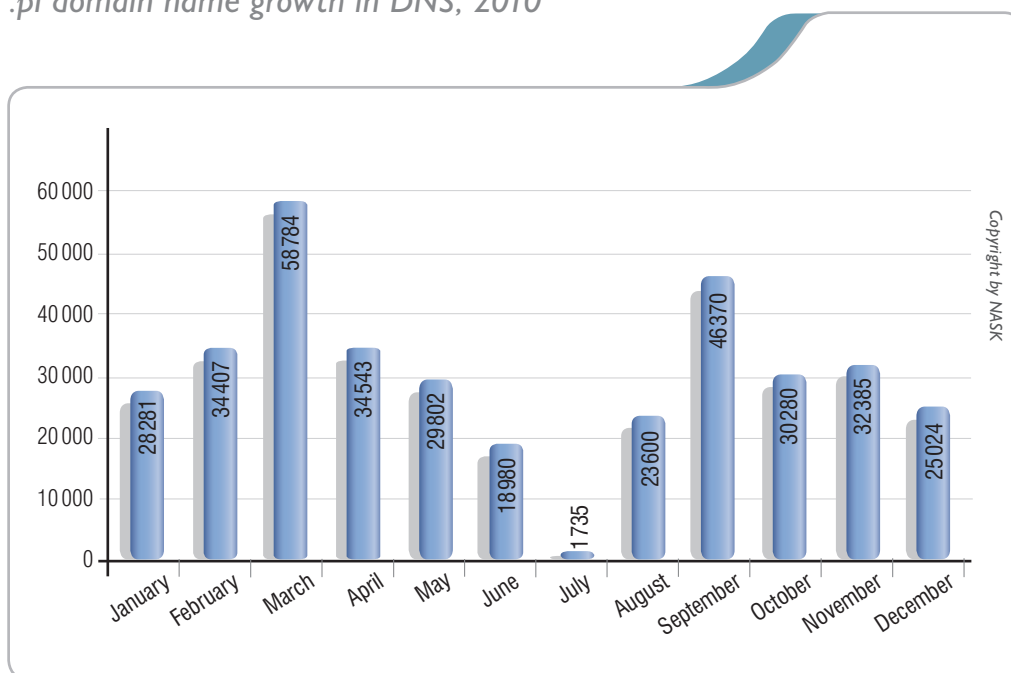


# MONTHLY GROWTH OF THE NUMBER OF .PL DOMAIN NAMES IN DNS IN 2010

The last quarter of 2010, in comparison to other quarters, characterized with smaller fluctuations in the .pl domain name increase in DNS. After the significant increases in the beginning of 2010, when in March a record number of **58 784** was noted, the dynamics dropped a bit in June only to return to its higher levels in August, comparable to the average dynamic level noted in 2009, and even surpass it in September.

In 2009 the average monthly increase of the .pl domain names, active in DNS, was equal to **25 540** while in 2010 it reached **30 349**.

*.pl domain name growth in DNS, 2010*



**Domain name market in Poland**

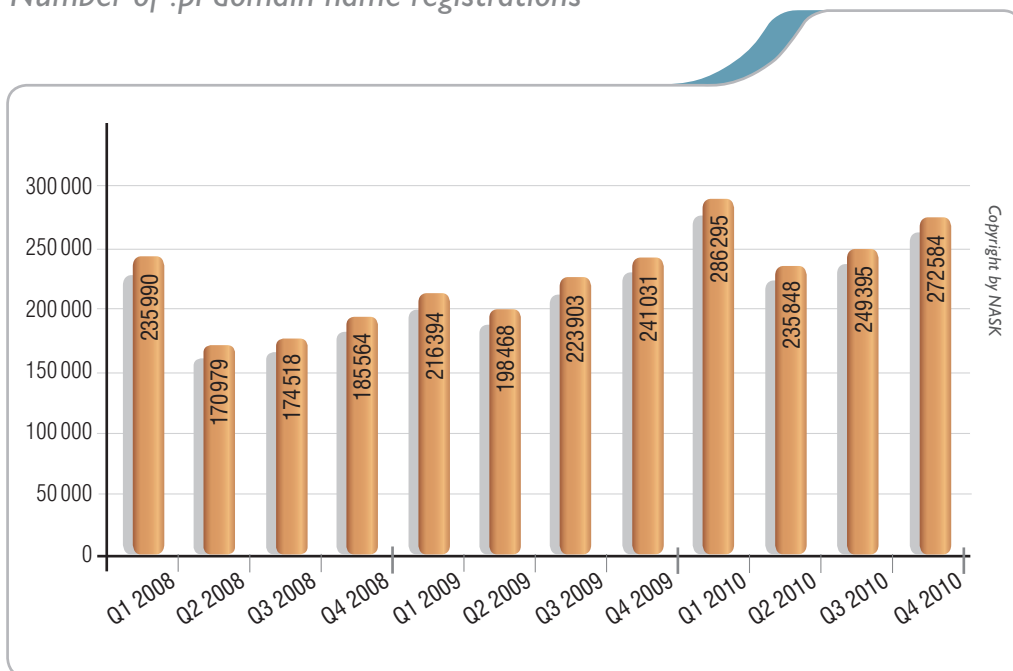
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# NUMBER OF **NEW** .PL DOMAIN NAME REGISTRATIONS

In the last three months of 2010, **272 584** new .pl domain names were registered. Thanks to that result the Q4 of 2010 is considered as the second best, right after the Q1 of 2010, in the .pl registration history. The number .pl domain name registrations in the consecutive months of the Q4 2010 was equal to: in October – **94 116**, in November – **94 215**, in December – **84 253**.

Number of .pl domain name registrations



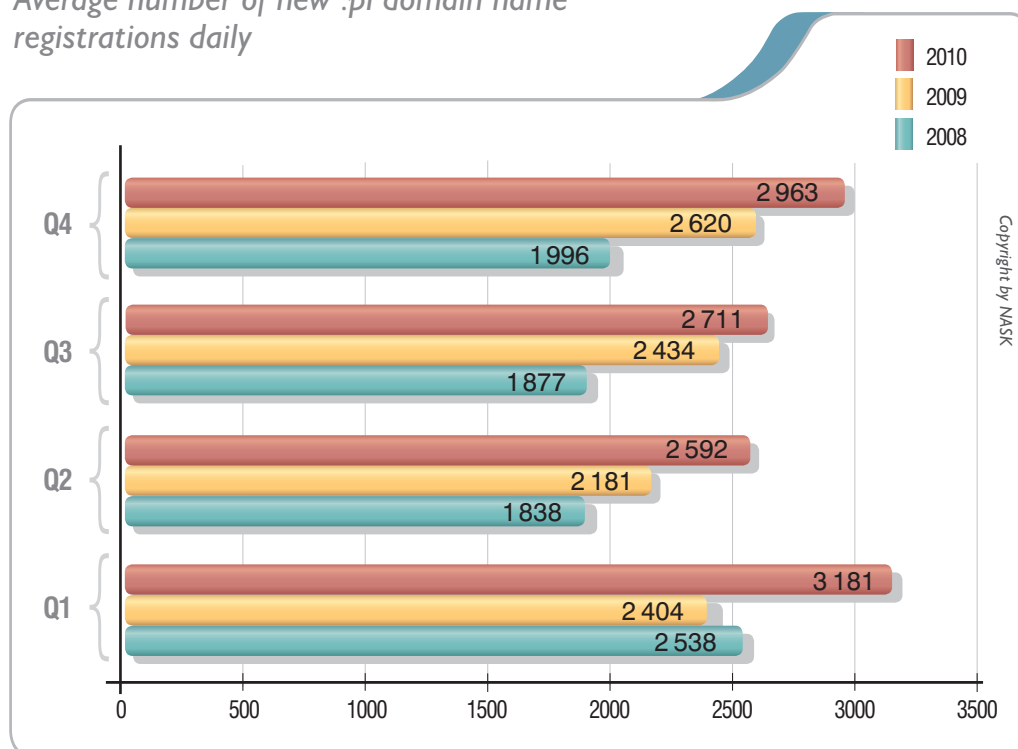


# NUMBER OF NEW .PL DOMAIN NAME REGISTRATIONS, DAILY AVERAGE

Q4 of 2010 was a very good period for new .pl domain name registrations. On average, the registry was filled with **2 963** new domain names every day.

In 2010 the daily average of new .pl domain name registrations was equal to **2 861**.

Average number of new .pl domain name registrations daily

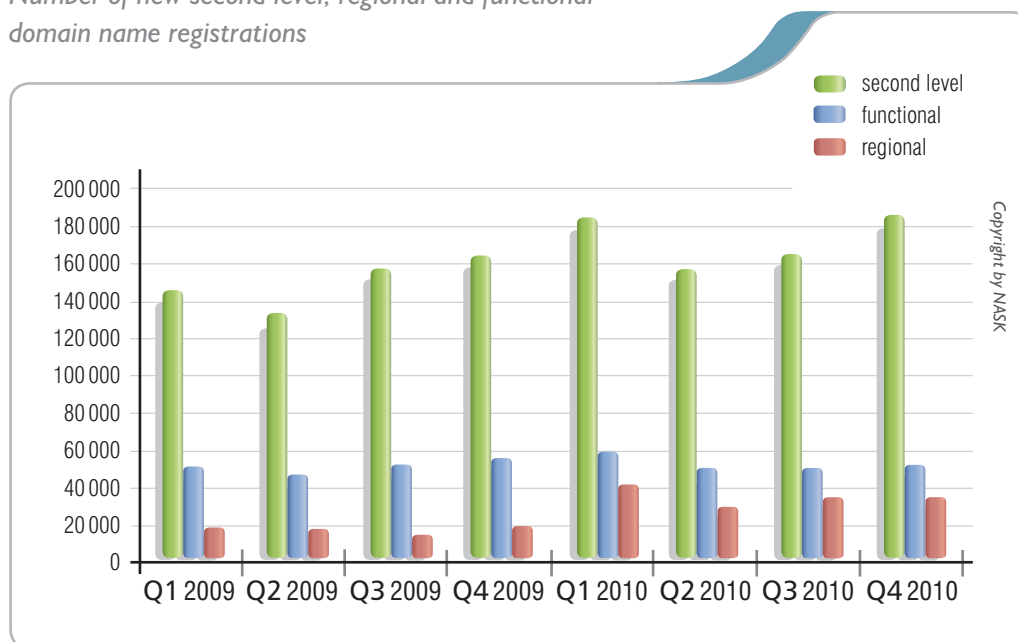


# COMPARISON BETWEEN SECOND LEVEL, REGIONAL AND FUNCTIONAL DOMAIN NAME REGISTRATIONS

The end of the year 2010 confirms the tendency observed in the last three quarters. There is an increasing interest in registering regional domain names at the cost of functional and second level .pl domain names.

Comparing to the last year, the share of names registered in regional domains increased by **6,61 p.p.** The share of names registered in functional domains decreased by **2,97 p.p.** and in the second level by **3,63 p.p.**

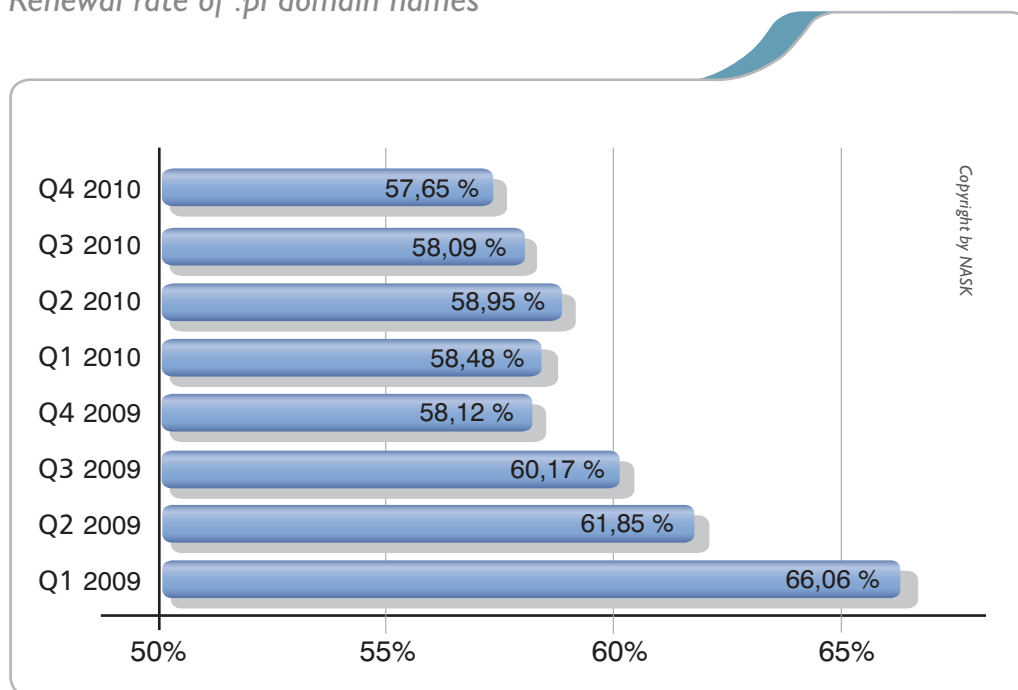
Number of new second level, regional and functional domain name registrations



# RENEWAL RATE OF .PL DOMAIN NAMES

The renewal percentage in the Q4 of 2010 was equal to **57,65 %**, which is a drop by **0,44 p.p.** in comparison to the previous quarter. This means tendency of decrease is still observed after a couple of minor reverses in the Q1 and Q2 of 2010.

Renewal rate of .pl domain names



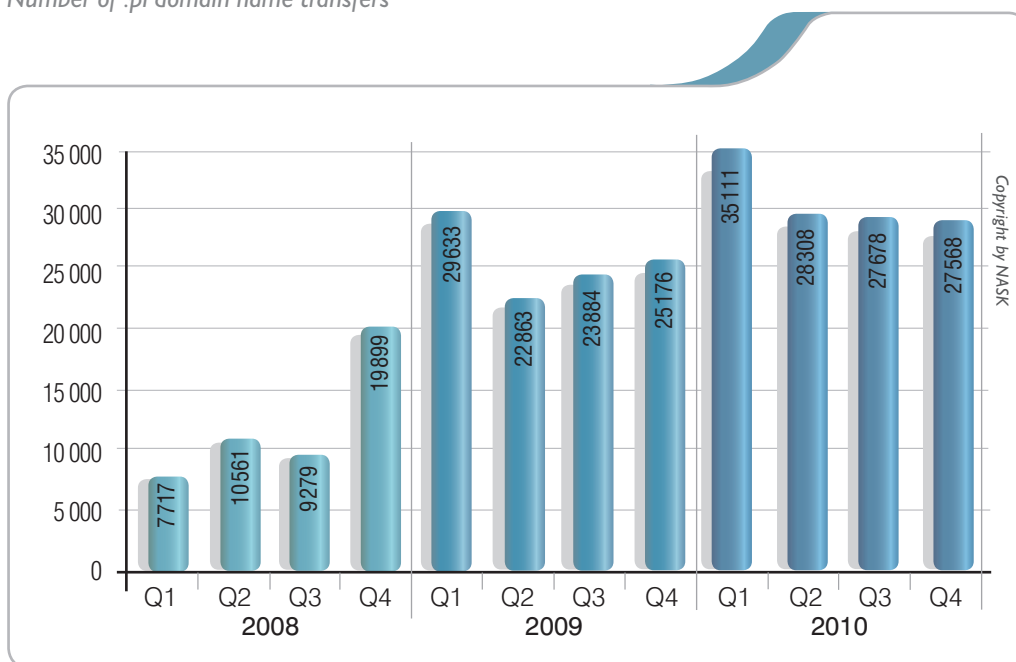
# TRANSFERS BETWEEN PARTNERS

Changes of the Partner maintaining the .pl domain names are not as dynamic as the increase of the .pl domain names in DNS.

The number of transfer operations between Partners of NASK stabilized in the last two years.

In the last three months of 2010, **27 568** transfers were made.

Number of .pl domain name transfers



# TRANSFER ANALYSIS

The end of the year 2010 did not bring any significant changes in the .pl transfer service structure. Still most of the transfers, over **65 %** of them, are being done before the end of the first billing period at a particular Partner.

Transfer period*	Percentage of transferred domain names
<b>1<sup>st</sup> year</b>	<b>65,33 %</b>
1 quarter	38,28 %
2 quarter	9,17 %
3 quarter	6,59 %
4 quarter	11,28 %
<b>2<sup>nd</sup> year</b>	<b>12,34 %</b>
<b>3<sup>rd</sup> year</b>	<b>5,61 %</b>
<b>4<sup>th</sup> year</b>	<b>4,89 %</b>
<b>5<sup>th</sup> year</b>	<b>4,47 %</b>
<b>6<sup>th</sup> year</b>	<b>3,22 %</b>
<b>in 7<sup>th</sup> year or later</b>	<b>4,13 %</b>

\*Transfer period, counted from the date of the registration or previous transfer operation

# CHANGES IN THE DNT REGISTRATION

The number of new .pl DNT registrations in the last three months of 2010 is equal to **15 229**, out of which **13,94 %** were registered as a result of the test. As in the previous quarter the lower the interest with the service the higher the successful rate quotient which results with a registration. For comparison, in the Q2 2010 with **35 470** domains tested, the success rate shaped at the level of **8,55 %**.

Number of DNT registrations

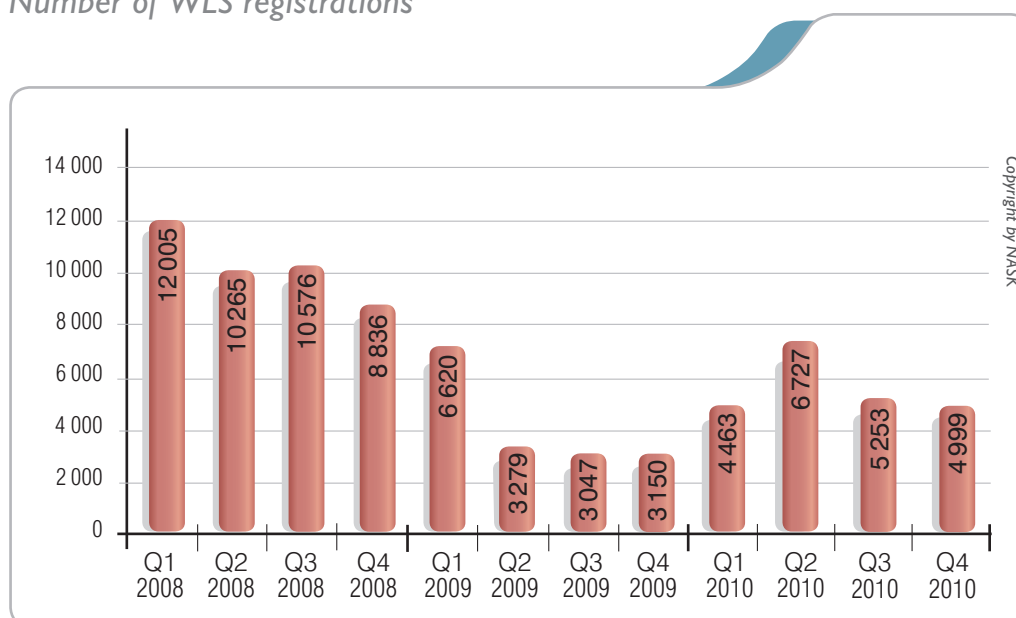


Since the starting of the service until the end of 2010, **261 816** .pl domain names were tested in total out of which **10,84 %** tests ended with a domain name registration.

# CHANGES IN THE QUANTITY OF WLS REGISTRATIONS

The amount of new .pl domain name WLS service contracts in the Q4 of 2010 was equal to **4 999**. During this time **2 945** options were realized, with **78,95 %** of them being realized during the first 12 months since the contract date.

Number of WLS registrations

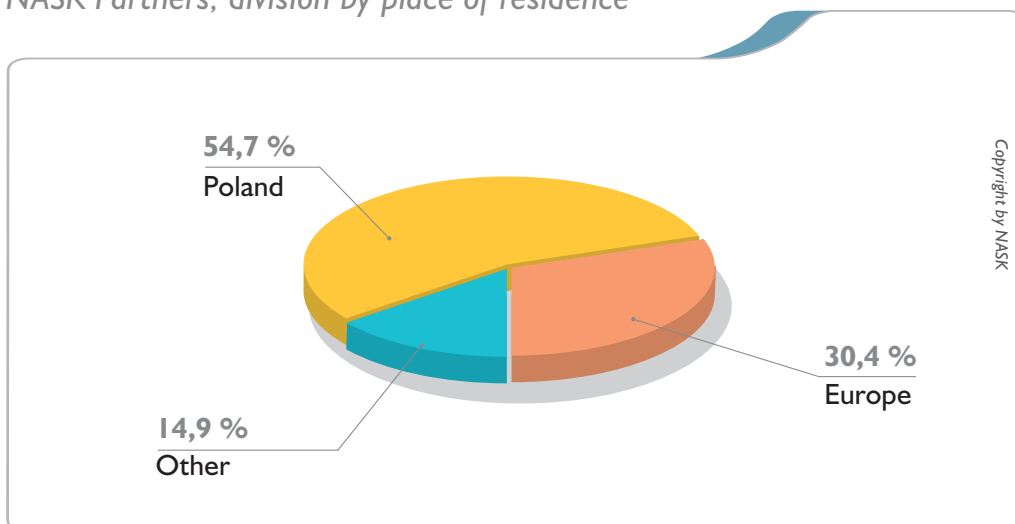


Since the introduction of the service in June 2004 till the end of the year 2010, **81 439** WLS contracts were made, out of which **38 131** were realized. Most of them (**90,49%**) were realized in first 12 months since the service was bought.

# PARTNERS

At the end of the year 2010, **148** companies from the entire globe were members of NASK Partner Programme concerning domain names registration and maintenance. Most of the Partners, **126** companies, reside in Europe with **81** of them having their seat in Poland. Remaining **22** come from parts of the world outside Europe.

*NASK Partners, division by place of residence*

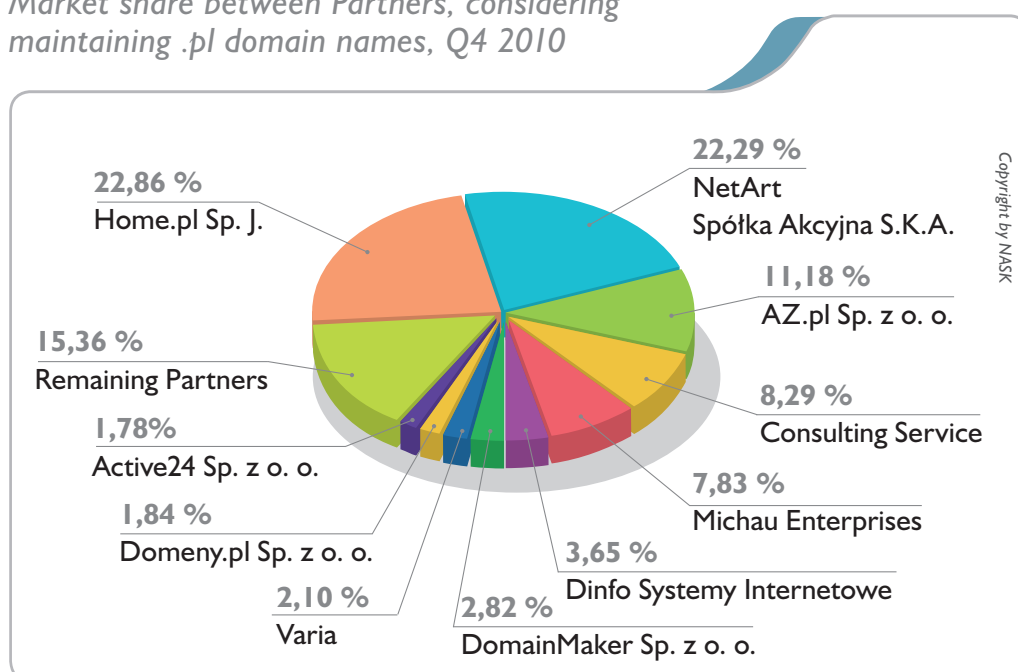




# MARKET SHARE BETWEEN PARTNERS CONSIDERING .PL DOMAIN NAMES

The share of the market between Partners, when we consider the amount of maintained .pl domain names, increased in Q4 to **98,28 %** and is an increase by **0,12 p.p.** when compared to the previous quarter.

*Market share between Partners, considering maintaining .pl domain names, Q4 2010*



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

Home.pl Sp. j. remains as the leader, maintaining **22,86 %** .pl domain names. Second place is occupied by NetArt SA S.K.A. with **22,29 %** market share. Only three Partners out of the TOP 10 noted a percentile increase in the maintained .pl domain names: Az.pl Sp. z o.o., Michau Enterprises, Ltd and Varia. Partners out of the TOP 10 also increased their cumulative share on the market from **14,31 %** to **15,36 %**.

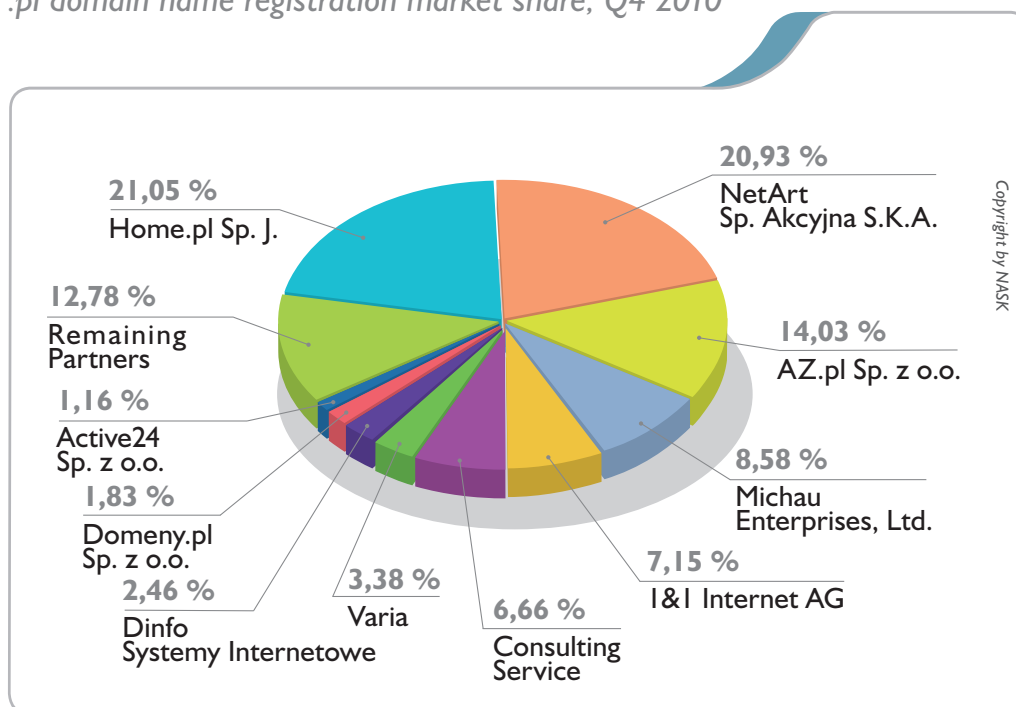
**Domain name market in Poland**

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# MARKET SHARE BETWEEN PARTNERS CONSIDERING **NEW** REGISTRATIONS

.pl domain name registration market share, Q4 2010



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

In Q4 2010 many changes occurred in the share between Partners when it comes to new .pl domain name registration market. Registrars Home.pl Sp. j. and Netart SA S.K.A. are still in the lead but their overall share in new registrations decreased cumulatively by **2,9 p.p.** Only two Partners noted increases in their share on the market: Az.pl Sp. z o.o. and Michau Enterprises, Ltd with a cumulative increase by **1,2 p.p.** A new registrar – I&I Internet AG appeared in the summary – with a significant share equal to **7,15 %**.

Domain name market in Poland

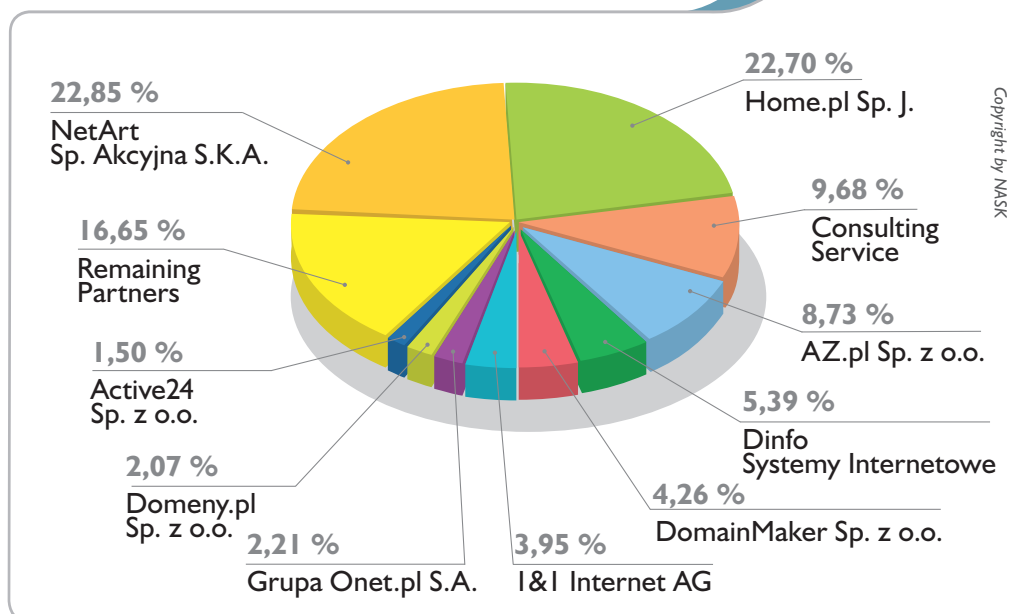
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# MARKET SHARE BETWEEN PARTNERS CONSIDERING REGISTRARS

Fourth quarter of 2010 ended with an increase of unique domain name subscribers by almost **42 thousand** which gave a cumulative result of almost **770 thousand** .pl domain name registrants at the end of 2010. Over **56 %** of these registrants are private persons.

Market share between Partners considering registrars, Q4 2010



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

At the end of 2010, Partner NetArt SA S.K.A. became the leader maintaining **22,85 %** of all .pl domain name registrants. Second place belongs to Home.pl Sp. j. having **22,70 %** share. New Registrar appeared in the ranking – I&I internet AG with **3,95 %** market share.

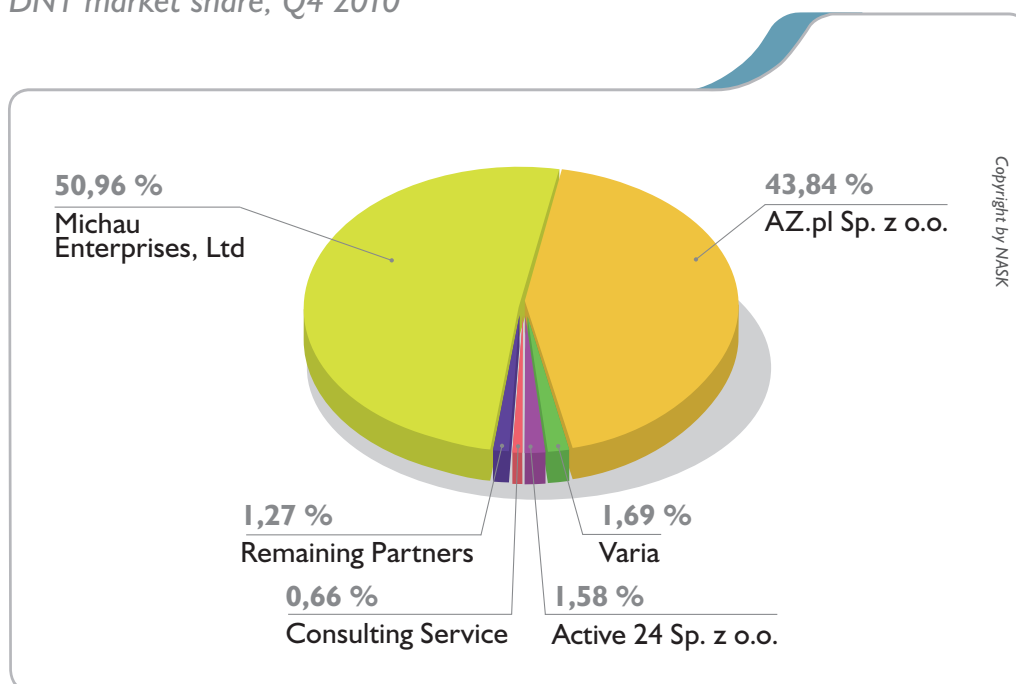
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# MARKET SHARE BETWEEN PARTNERS CONSIDERING DNT REGISTRATIONS

DNT market share, Q4 2010



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

Fourth quarter of 2010 brought many changes also on the DNT registration market. For the first time in 2010 Michau Enterprises, Ltd became the leader achieving almost **51 %** of market share. Second position belongs to Az.pl Sp. z o.o. with **43,84 %**. Consulting Service appeared here for the first time with **0,66 %** share.

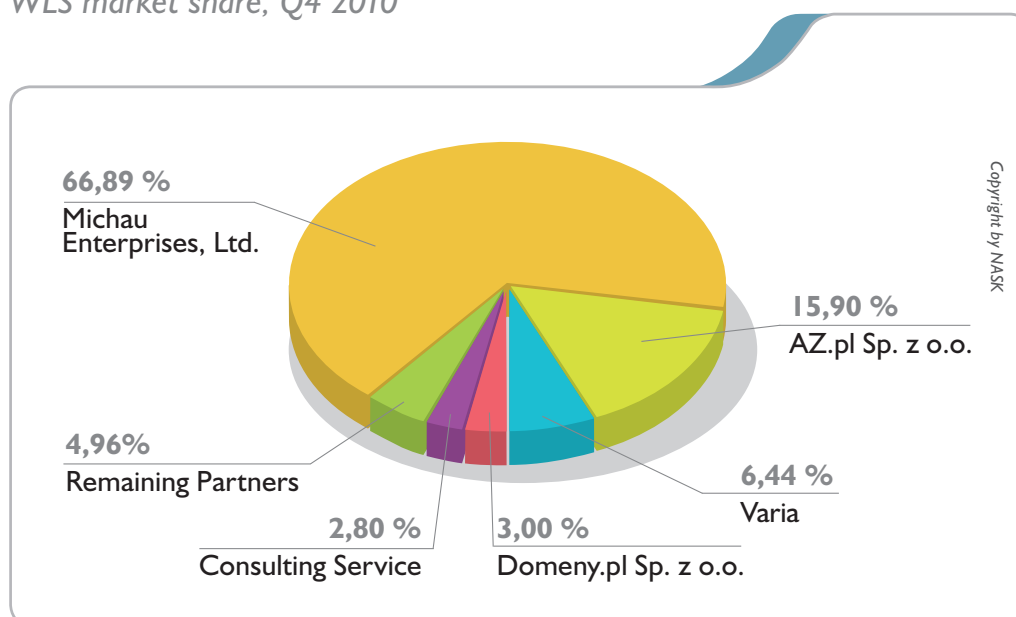
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# MARKET SHARE BETWEEN PARTNERS CONSIDERING **WLS** REGISTRATIONS

WLS market share, Q4 2010



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

End of the year 2010 brought no surprises on the WLS registration market. First place is still occupied by Michau Enterprises, Ltd with the **66,89 %** share. Az.pl Sp. z o.o. further increased its share to almost **16 %**. Domeny.pl Sp. z.o.o. and Consulting Service also did increase its cumulative share by **1 p.p.** in the fourth quarter.