

NASK

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.PL DOMAIN NAME MARKET

■ NASK's Report for the second quarter of 2016

Q2 2016

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INTRODUCTION

Dear Readers,

I am providing you with a consecutive quarter report containing specific data on the domain market in Poland.

The results, presented in the report for the second quarter of 2016, prove the stability on the .pl domain market after the period of attaining record results both in the number of new registrations and the growth dynamics of the number of names active in DNS during some of the previous quarters. In this respect it is worthwhile to note that despite the low growth rate of the .pl domain names, recorded during the second quarter, the annual growth of the registry, at the end of June 2016, attained a satisfying level of 4.62% in respect to the result at the level of 3% recorded by the registries associated in CENTR.

At the end of the first half of 2016 the volume of the .pl domain registry amounted to 2 713 345 names active in DNS, maintained for 1 022 thousand registrants. During the second quarter of 2016 in the .pl domain registry 261 843 new registrations were

recorded. A daily average number of registrations equaled 2 877.

As it results from the data, presented in the report, the renewal rate remained at the level corresponding with that of the previous quarter (62.11%). Registrants renewed nearly 380 thousand .pl domain names and more often used the service of the modification of a billing period end-date.

It is worthy of note that the interest in the service of DNSSEC was still growing. At the end of the first half of 2016 the number of .pl domain names, secured with the DNSSEC protocol, amounted to 28 794, by 1 133 more than in the first quarter.

I invite you to get acquainted with the newest report, presenting the data from the .pl domain registry for the second quarter of 2016.

Wojciech Kamieniecki
NASK Director

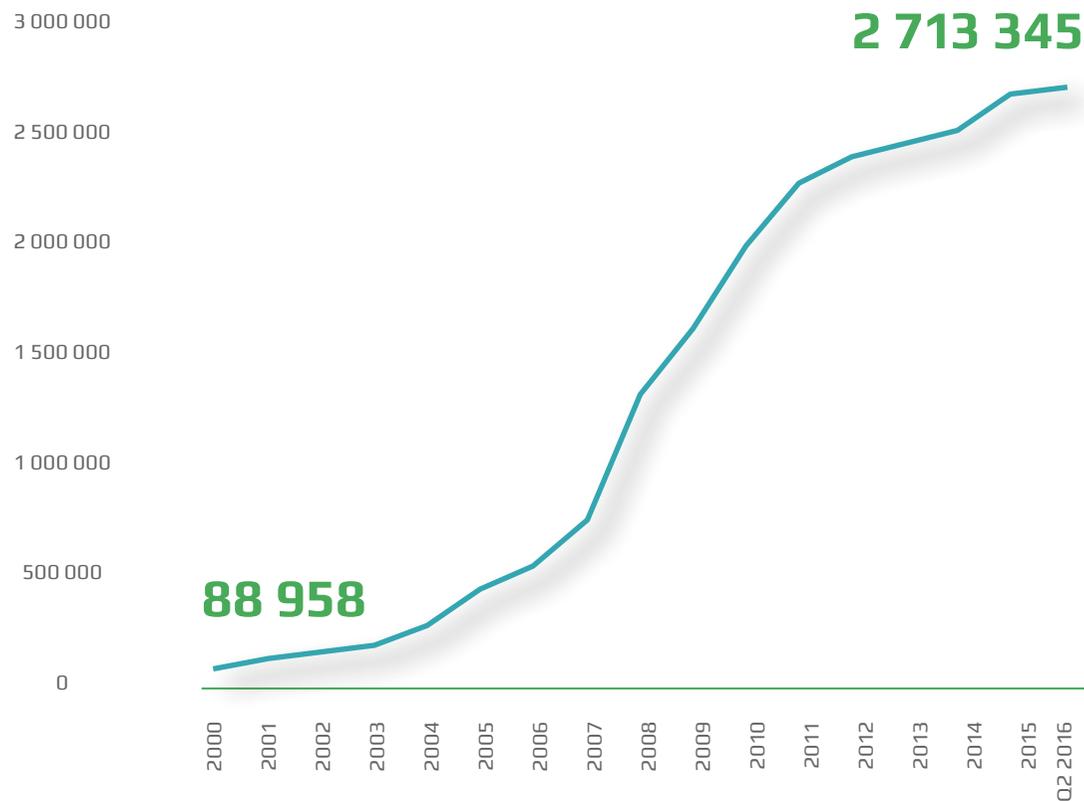
NUMBER OF .PL DOMAIN NAMES IN DNS

The .pl domain registry finished the first half of 2016 with **2 713 345** names active in DNS. During the second quarter of 2016 **1 145** names were added to the registry, whereby in April the number grew by **6 625** names, whereas in two successive months it decreased by **1 455** in May and **4 025** in June.

At the end of June 2016 **74.30%** of the names, maintained in the registry, were registered directly in the .pl domain, **20.57%** in the functional domains and **5.13%** in the regional domains.

At the end of the second quarter, the names containing national diacritic signs (IDN), constituted **1.65%** of all active .pl domain names and their number amounted to **44 832**.

The annual growth dynamics of the .pl domain names, at the end of June 2016, amounted to **4.62%**.



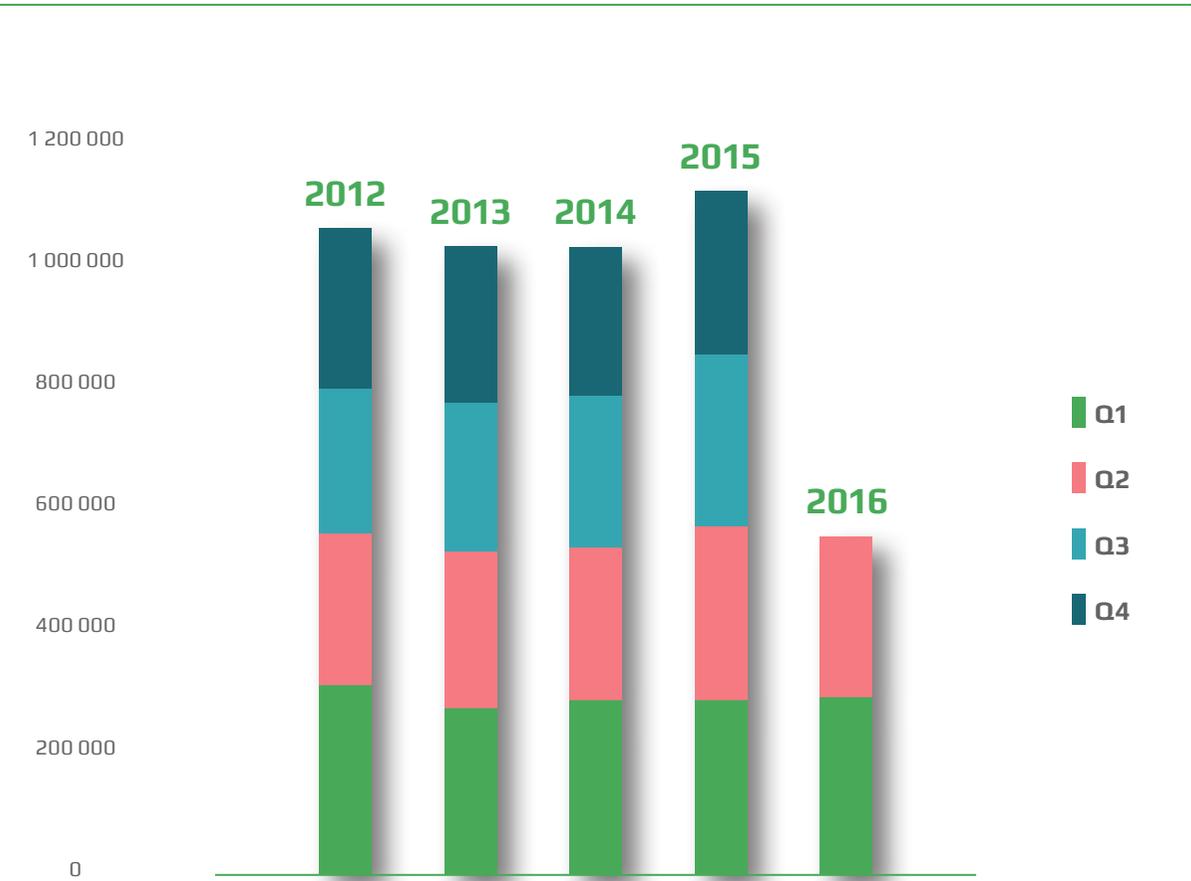
Number of .pl domain names in DNS

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NUMBER OF NEW .PL DOMAIN NAME REGISTRATIONS

During the second quarter of 2016 **261 843** new .pl domain names were registered. The number of new registrations in particular months amounted to **94 272** in April, **86 243** in May and **81 328** in June.

Out of all new domain names, registered in the second quarter of 2016, only **1 126** names contained national diacritic signs which constituted **0.43%** of new registrations.



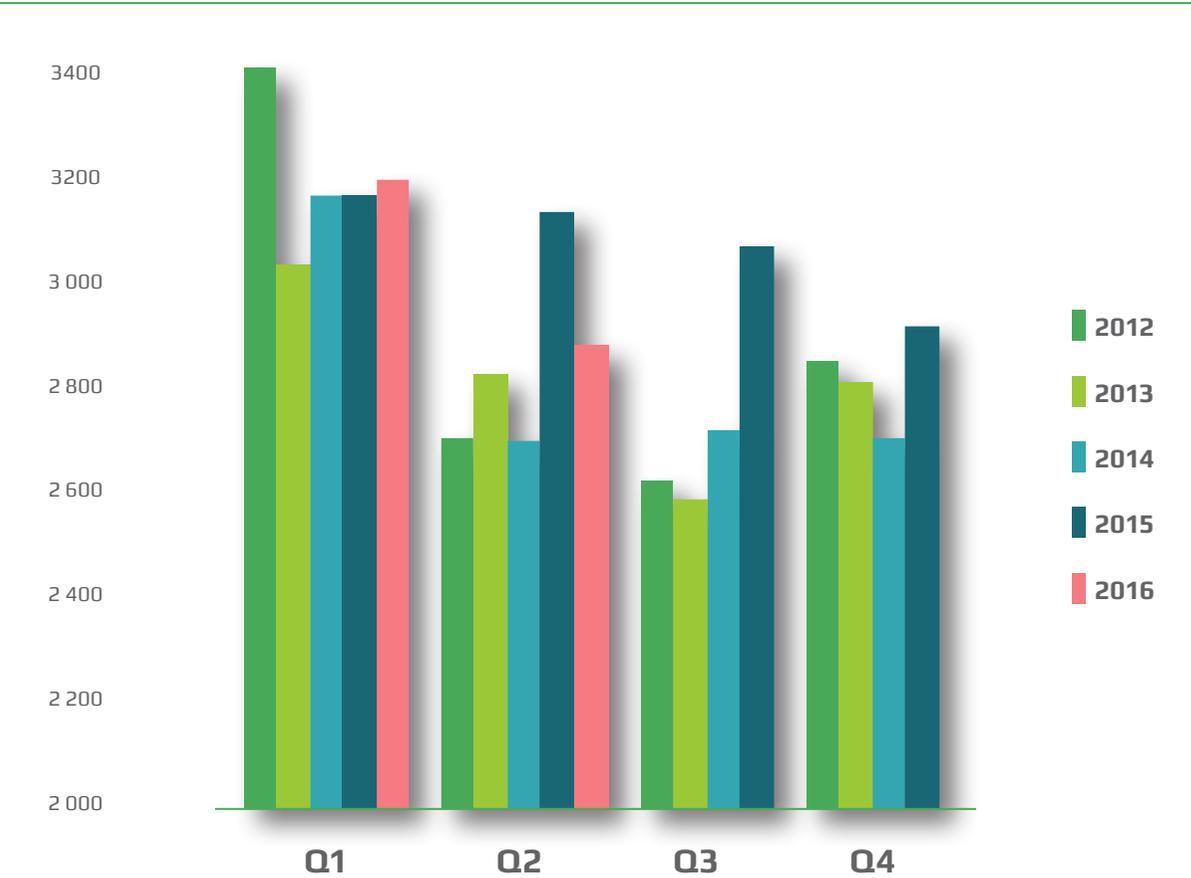
Number of .pl domain name registrations

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NUMBER OF NEW .PL DOMAIN NAME REGISTRATIONS, DAILY AVERAGE

In the second quarter of 2016 a daily average number of new .pl domain name registrations equalled **2 877**.

The month with the highest daily average number of domain name registrations was April with the result of **3 142** new names. In May there were **2 782** names registered daily average while in June **2 711** names.



Number of .pl domain name registrations, daily average

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NUMBER OF NEW .PL DOMAIN NAME REGISTRATIONS AS DIVIDED INTO THE TYPE OF ZONE

During the quarter under discussion the most popular, among registrants, was the registration of second level domain names. i.e. directly in .pl. The consecutive position was held by functional domain names whereas the least popular were regional domain names.

200 847 names were registered directly in the national .pl extension, which constituted **76.71%** of the total number of registrations effected in that period. The number of new registrations in functional extensions (e.g. .com.pl, .info.pl) amounted to **47 530** names constituting **18.15%** of share in all registrations during the second quarter of 2016. The remaining **5.14%** of share constituted the names in regional domains (e.g. .waw.pl, .wroclaw.pl) the number of which equaled **13 466**.

In comparison to the previous quarter the share of registrations, effected directly in the .pl domain, grew by **1.61p.p.**, whereas the share of names, registered in the functional and regional domains, dropped by **0.85p.p.** and **0.76p.p.** respectively.



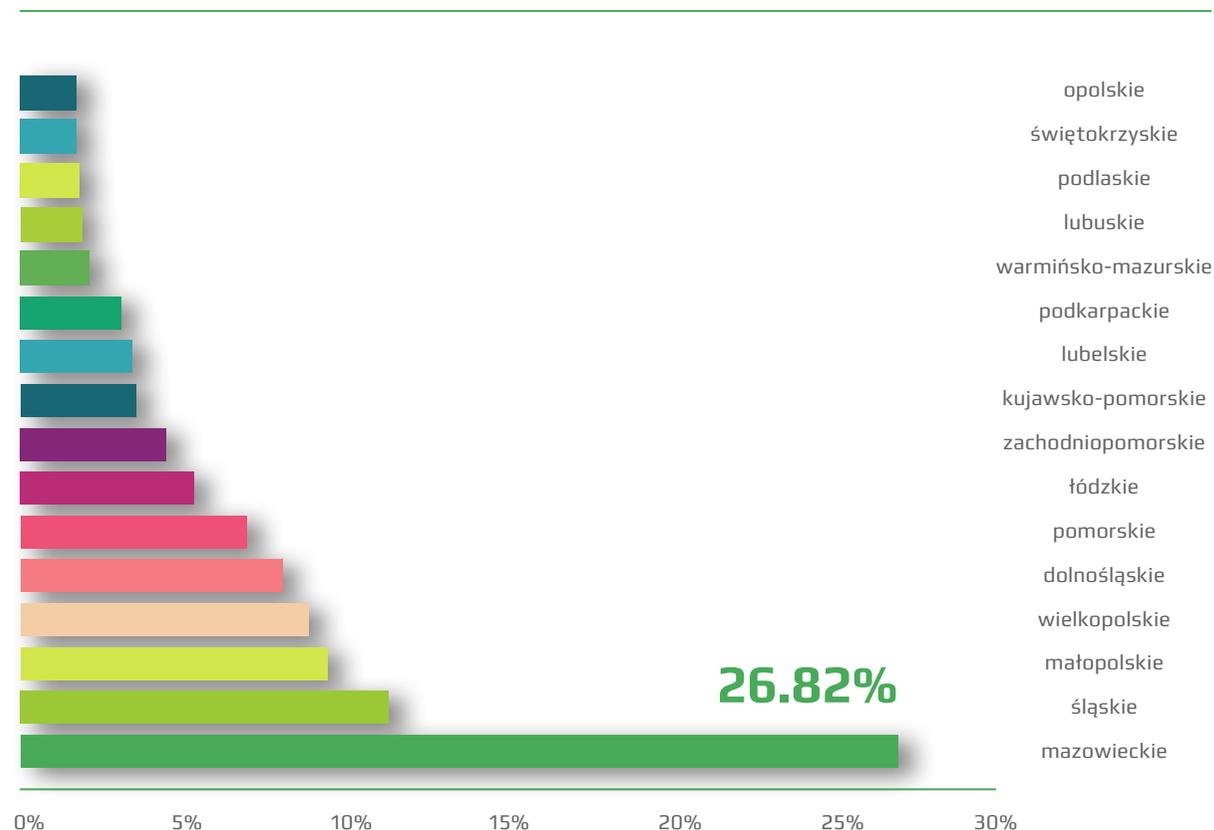
Number of new second level, regional and functional .pl domain name registrations

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NEW .PL DOMAIN NAME REGISTRATION VS. THE REGISTRANT'S PLACE OF RESIDENCE

In the second quarter of 2016 nearly **93%** of new .pl domain names were registered for the registrants domiciled in Poland. Beyond Poland the largest number of .pl domain names was registered for the registrants from Cyprus – **50.27%**, Germany – **10.63%**, followed by the United Kingdom – **8.04%**, the United States – **6.98%** and Czech Republic – **3.04%**.

The division of new registrations, carried out during the discussed quarter, for the registrants from Poland, by account of the place of residence or the localisation of the registered office, confirms the tendency, observed in previous quarters, that the most numerous group constituted the registrations for the registrants from the Mazowieckie Province, **26.82%**. For the registrants from the Śląskie Province there were registered **11.26%** of names, from Małopolskie **9.37%**, from Wielkopolskie **8.80%**, from Dolnośląskie **8.00%**, from Pomorskie **6.89%**, from Łódzkie **5.29%**, from Zachodniopomorskie **4.43%**, from Kujawsko-Pomorskie **3.50%**, from Lubelskie **3.42%**, from Podkarpackie **3.06%** and from Warmińsko-Mazurskie **2.11%** of .pl domain names. The lowest number of registrations effected in Poland was recorded in case of registrants domiciled in: Lubuskie **1.85%**, Podlaskie **1.79%**, Świętokrzyskie **1.71%**, and Opolskie **1.70%** of names.



Number of new registrations as divided into provinces, Q2 2016

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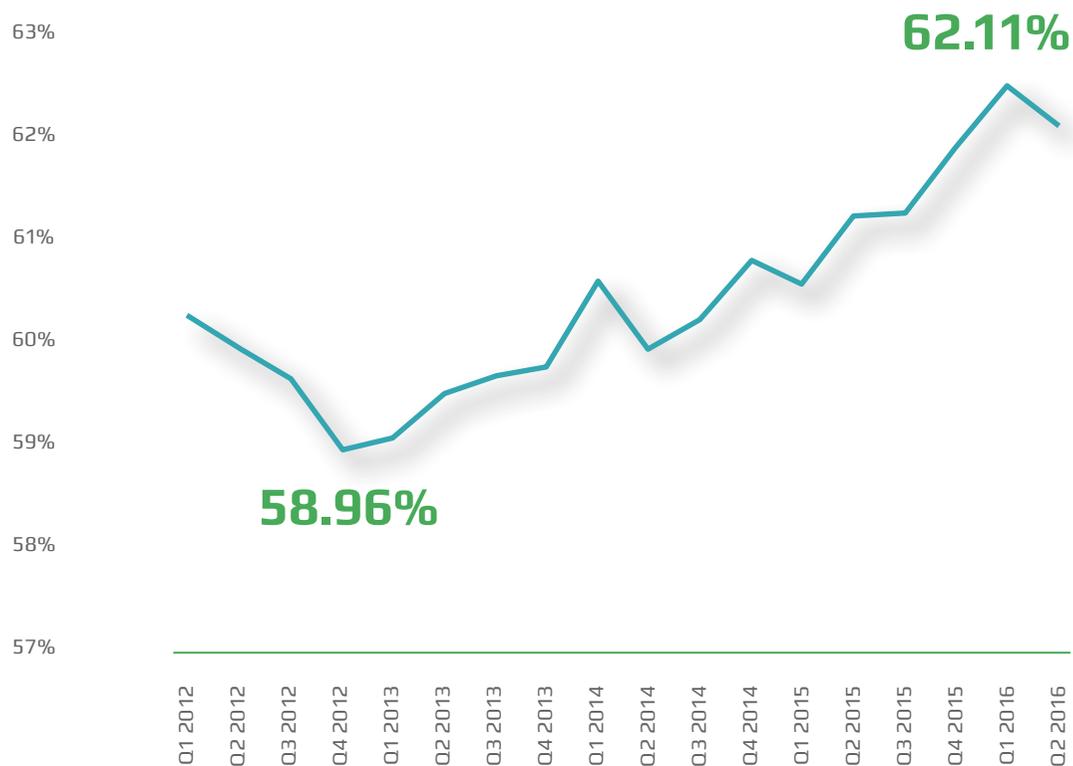
RENEWAL RATE OF .PL DOMAIN NAMES

At the end of the first half of 2016 the share of renewed names in the number of .pl domain names, subject to be renewed for a consecutive billing period, amounted to **62.11%** which was by **0.35p.p.** lower than at the end of the first quarter of 2016.

During the second quarter of 2016 the registrants renewed nearly **380 thousand** .pl domain names.

The structure of domain names, renewed during the quarter under discussion, was shaped in the following manner: **75.12%** of names were renewed directly in the .pl domain, **20.38%** were renewed in functional domains while remaining **4.5%** in regional domains.

In the second quarter of 2016 the service of the modification of a billing period end-date gained in popularity. In case of **1516** names, by **241** more than in the previous quarter, the end date of the billing period was shifted by an individually defined number of days.



Renewal rate of .pl domain names

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TRANSFERS

From the beginning of April to the end of June 2016 the registrants of the .pl domain registry **42 511** times changed the registrar servicing a maintained domain name.

1 374 registrar changes referred to simultaneous renewal of the .pl domain name for a consecutive billing period with **1 054** of them being effected after the previous billing period had been completed.

In the second quarter of 2016, the service was transferred **467** times daily average, which was by **48** more than in the corresponding period in the previous year.



Number of .pl domain name transfers

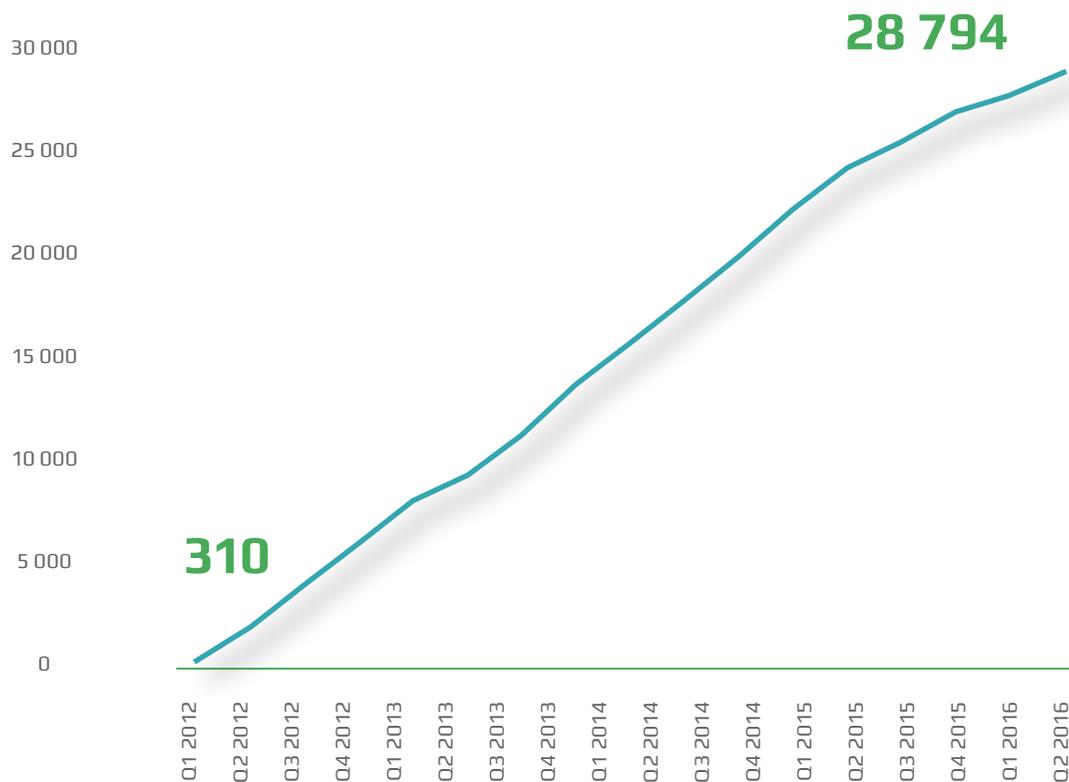
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DNSSEC IN THE .PL DOMAIN NAME

With the end of the first half of 2016 the .pl domain registry contained **28 794** names secured with the DNSSEC protocol, with **87%** thereof being in the .pl zone. In comparison to the previous quarter the number of secured names increased by **1 133**.

Daily average **12.45** names, secured with the DNSSEC protocol, were added in the .pl domain registry. **23.5%** of domain names, secured with the DNSSEC protocol, were registered in 2016, **34.5%** in 2015, **18.19%** in 2014, **10.37%** in 2013, **5.47%** in 2012 and in total **7.97%** of names in previous years.

In the second quarter of 2016 **41** registrars, cooperating with NASK, assisted in entering records, confirming properly secured .pl domain names, to the registry.



Number of the .pl domain names secured with DNSSEC

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REGISTRANTS OF .PL DOMAIN NAMES

The .pl domain registry, at the end of June 2016, contained **1 022 054** registrants with **66.95%** thereof being entrepreneurs and remaining **33.05%** natural persons.

Out of **2 713 345** .pl domain names, active in DNS, **70.46%** were maintained for entrepreneurs and remaining **29.54%** for natural persons.

On average **2.65** .pl domain names fell for one registrant. **64.25%** of registrants were maintaining one .pl domain name, **14.34%** two names, **5.57%** three names, **4.31%** four names and **4.08%** five domain names. From six to nine names were being maintained by **5.08%** of registrants and more than ten names by **2.37%** of registry's clients.



**Division of Registrants
of .pl domain names, Q2 2016**

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**Division of .pl domain names
for Registrants, Q2 2016**

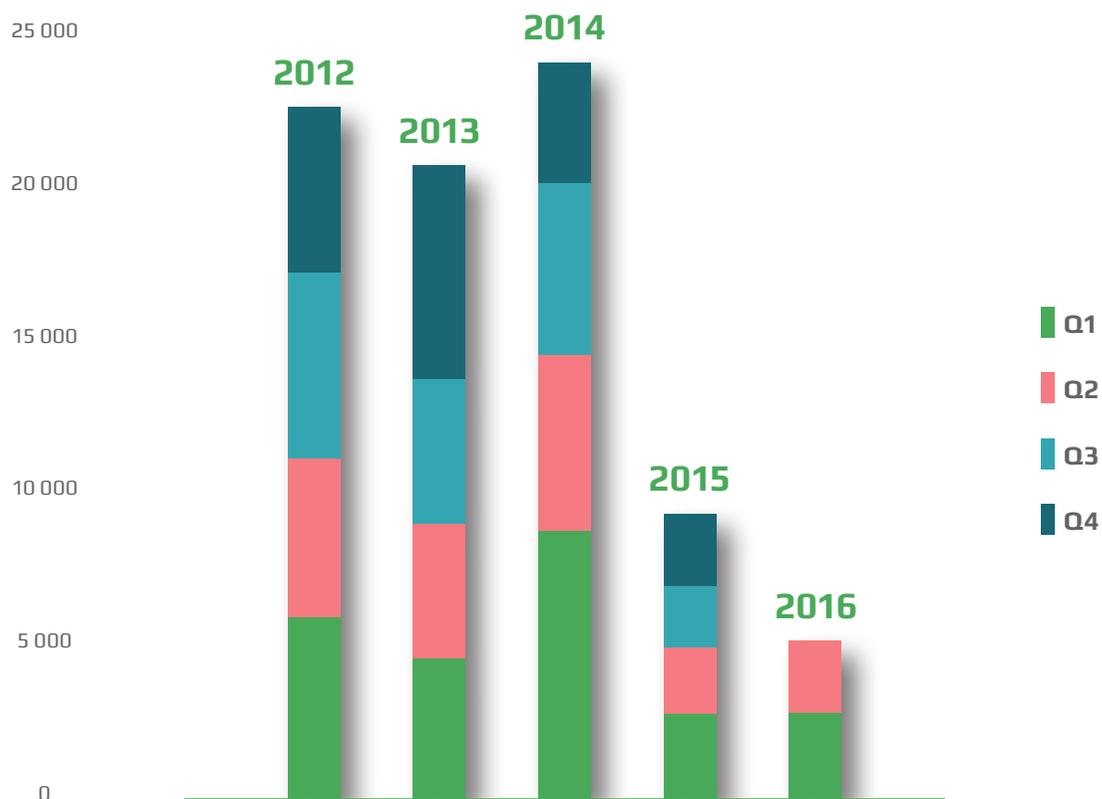
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WLS

In the second quarter of 2016 **2 346** agreements on options for the registration of the .pl domain names were concluded, whereas **391** existing agreements were renewed for consecutive 3 years. Within that period the number of options, set in particular months, amounted to: **825** in April, **779** in May and **742** in June.

From the beginning of April to the end of June 2016 **1 462** agreements on options ended with the provision of .pl domain names for registration, whereas in case of **95** provided names the formal requirements were not met or option holders resigned from registration thereof and they returned to the group of names available for registration.

Since launching the service of option for registration of a .pl domain name in June 2004 the registry concluded **189 003** agreements, with **45.24%** thereof being ended with the provision of a .pl domain name for registration.



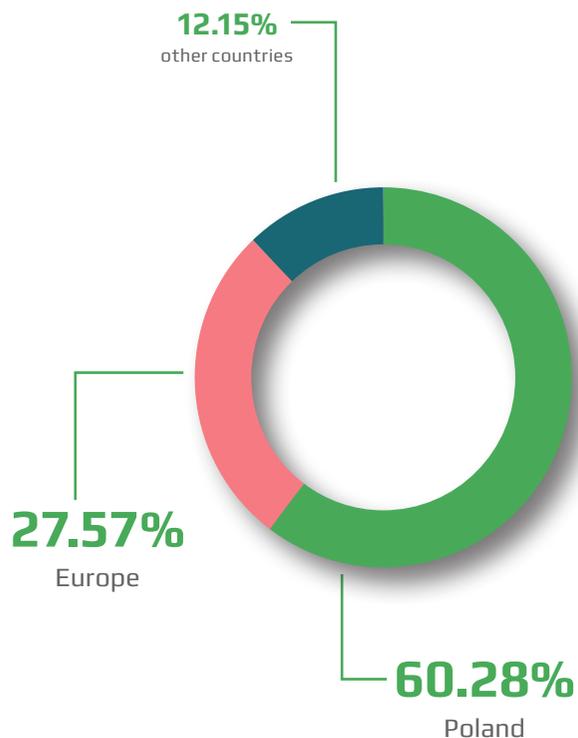
Number of WLS registrations

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NASK PARTNERS

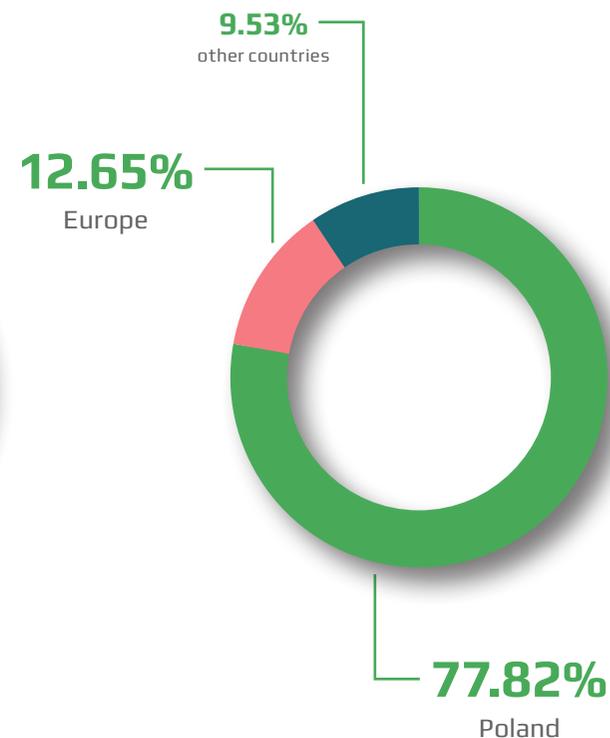
At the end of the second quarter of 2016 the .pl domain registry was cooperating with **214** registrars from all over the world.

129 registrars, servicing in total **77.82%** of names, had their registered office in Poland, **59** registrars, seated in other European countries, were servicing **12.65%** of .pl domain names and **26** registrars, headquartered beyond Europe, were servicing **9.53%** of .pl domain names.



Partners of NASK, division by place of residence, Q2 2016

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.pl domain name market share between Partners considering the place of residence, Q2 2016

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MARKET SHARE BETWEEN PARTNERS CONSIDERING .PL DOMAIN NAMES

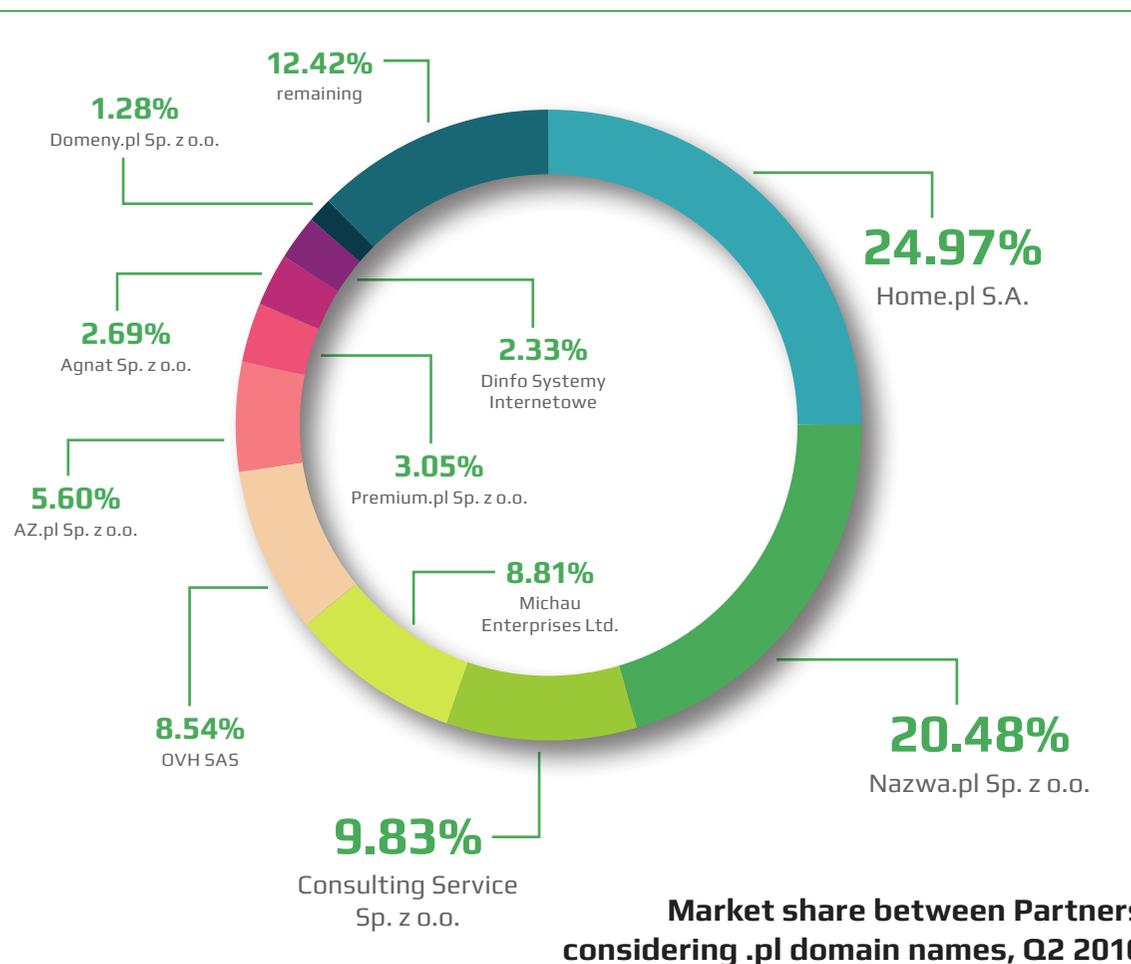
At the end of June 2016 the registrars, from the presented TOP 10, were servicing in total **87.58%** of .pl domain names active in DNS.

More than **55%** of names were being serviced by registrars holding the three first positions in the presented ranking: Home.pl S.A. – **24.97%**, Nazwa.pl Sp. z o.o. – **20.48%** and Consulting Service Sp. z o.o. – **9.83%**.

The successive places were taken by the following registrars: Michau Enterprises Ltd. – **8.81%**, OVH SAS – **8.54%**, AZ.pl Sp. z o.o. – **5.60%**, Premium.pl Sp. z o.o. – **3.05%**, Agnat Sp. z o.o. – **2.69%**, Dinfo Systemy Internetowe – **2.33%** and Domeny.pl Sp. z o.o. – **1.28%**.

During the second quarter of 2016 the highest increase in the number of serviced .pl domain names was recorded by: Michau Enterprises Ltd. by **0.24p.p.**, Consulting Service Sp. z o.o. and OVH SAS by **0.15p.p.** each.

The registrars, from beyond the presented TOP ten, were servicing in total **12.42%** of .pl domain names and their share in the second quarter of 2016 increased by **0.10p.p.**



Market share between Partners considering .pl domain names, Q2 2016

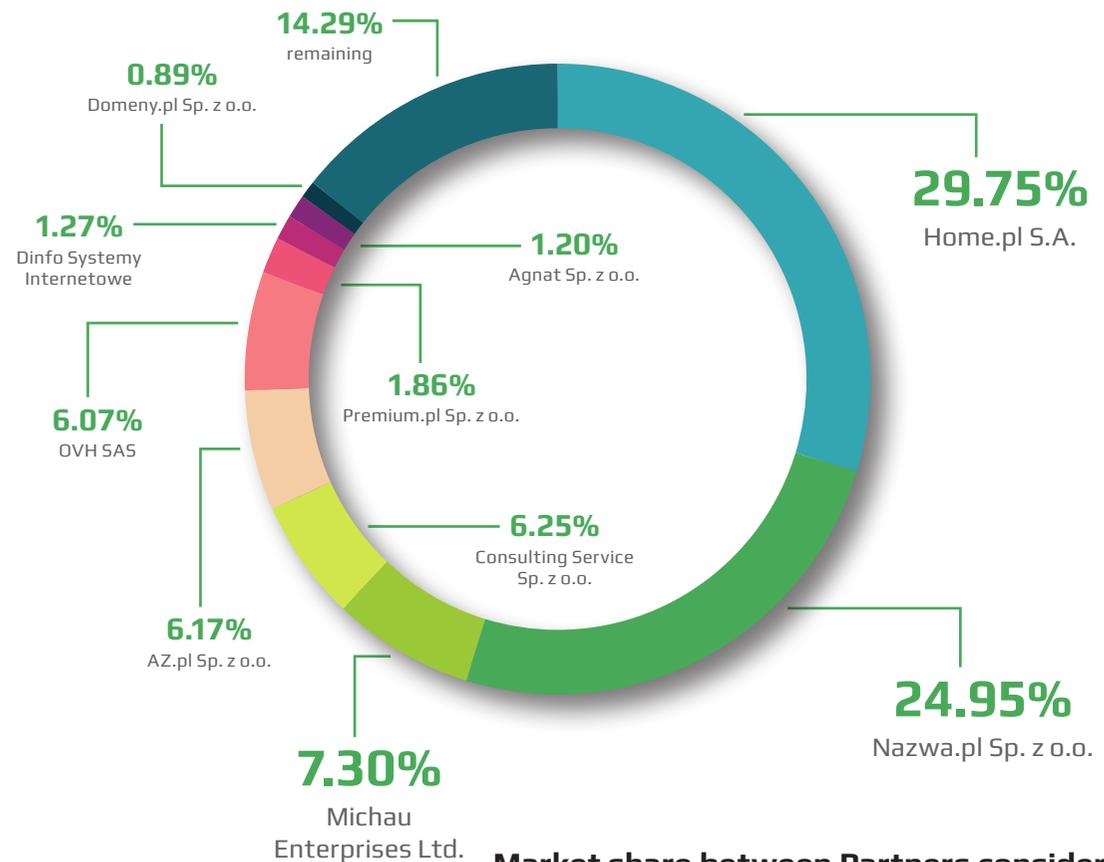
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MARKET SHARE BETWEEN PARTNERS CONSIDERING NEW REGISTRATIONS

In the second quarter of 2016 so much as **85.71%** of .pl domain name registrations were effected through NASK's Partners from the presented TOP 10.

The largest share in the market of newly registered .pl domain names belonged to Home.pl S.A. which assisted in registration of **29.75%** of names. The successive most frequently chosen registrar was Nazwa.pl Sp. z o.o. with the share of **24.95%** in new registrations. The successive positions in the breakdown were held by: Michau Enterprises Ltd. – **7.30%**, Consulting Service Sp. z o.o. – **6.25%**, AZ.pl Sp. z o.o. – **6.17%**, OVH SAS – **6.07%**, Premium.pl Sp. z o.o. – **1.86%**, Dinfo Systemy Internetowe – **1.27%**, Agnat Sp. z o.o. – **1.20%** and Domeny.pl Sp. z o.o. – **0.89%**.

NASK's Partners, beyond the presented TOP 10, assisted in concluding **14.29%** of agreements on the maintenance of .pl domain names.



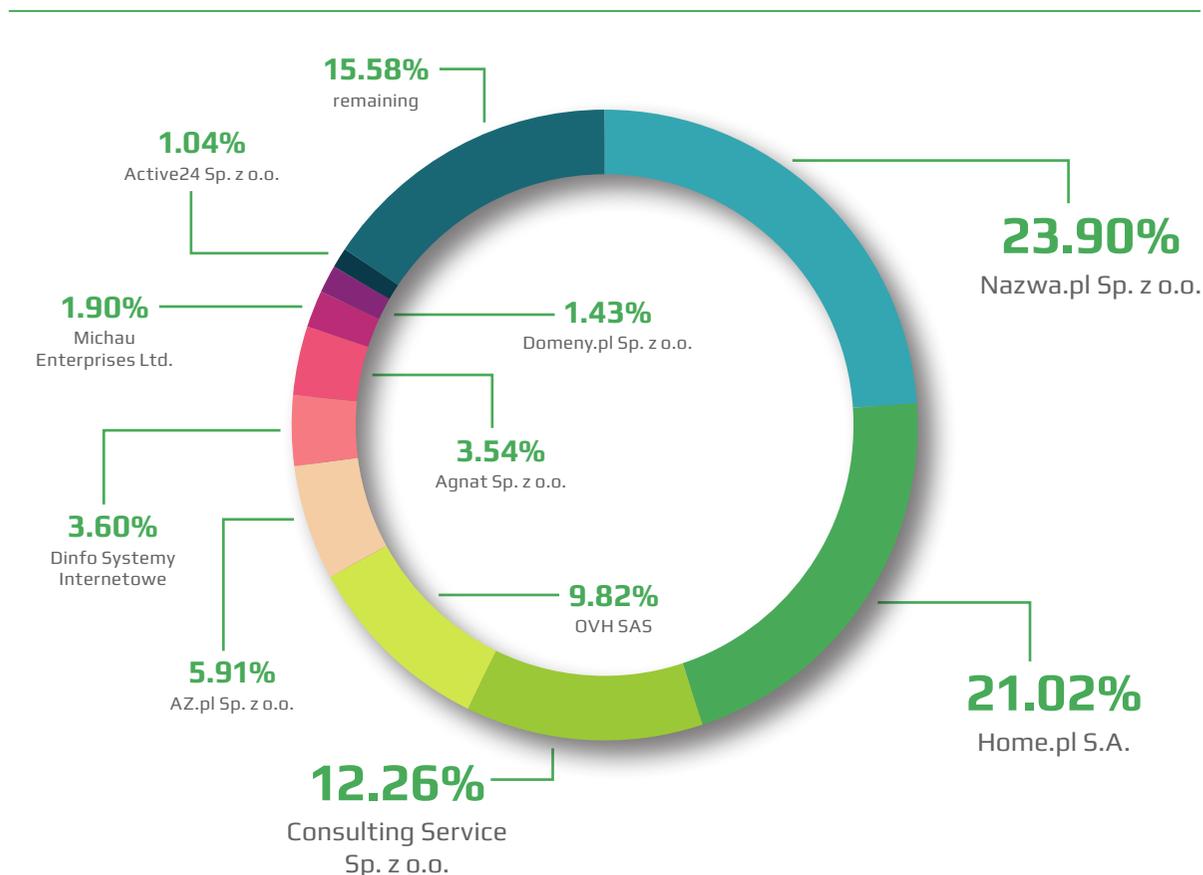
Market share between Partners considering new .pl domain name registrations, Q2 2016

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MARKET SHARE BETWEEN PARTNERS CONSIDERING REGISTRANTS

At the end of the second quarter of 2016, the highest share in the service of .pl domain name registrants had Nazwa.pl Sp. z o.o. with the result of **23.90%**. The second largest share, by account of the number of serviced registrants, was accomplished by Home.pl S.A. with **21.02%**. The consecutive places in the ranking were held by: Consulting Service Sp. z o.o. – **12.26%**, OVH SAS – **9.82%**, AZ.pl Sp. z o.o. – **5.91%**, Dinfo Systemy Internetowe – **3.60%**, Agnat Sp. z o.o. – **3.54%**, Michau Enterprises Ltd. – **1.90%**, Domeny.pl Sp. z o.o. – **1.43%** and Active24 Sp. z o.o. – **1.04%**.

Registrars, from beyond the TOP 10, in the second quarter of 2016, were servicing in total **15.58%** of .pl domain name registrants.



Market share between Partners considering .pl domain name Registrants, Q2 2016*

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

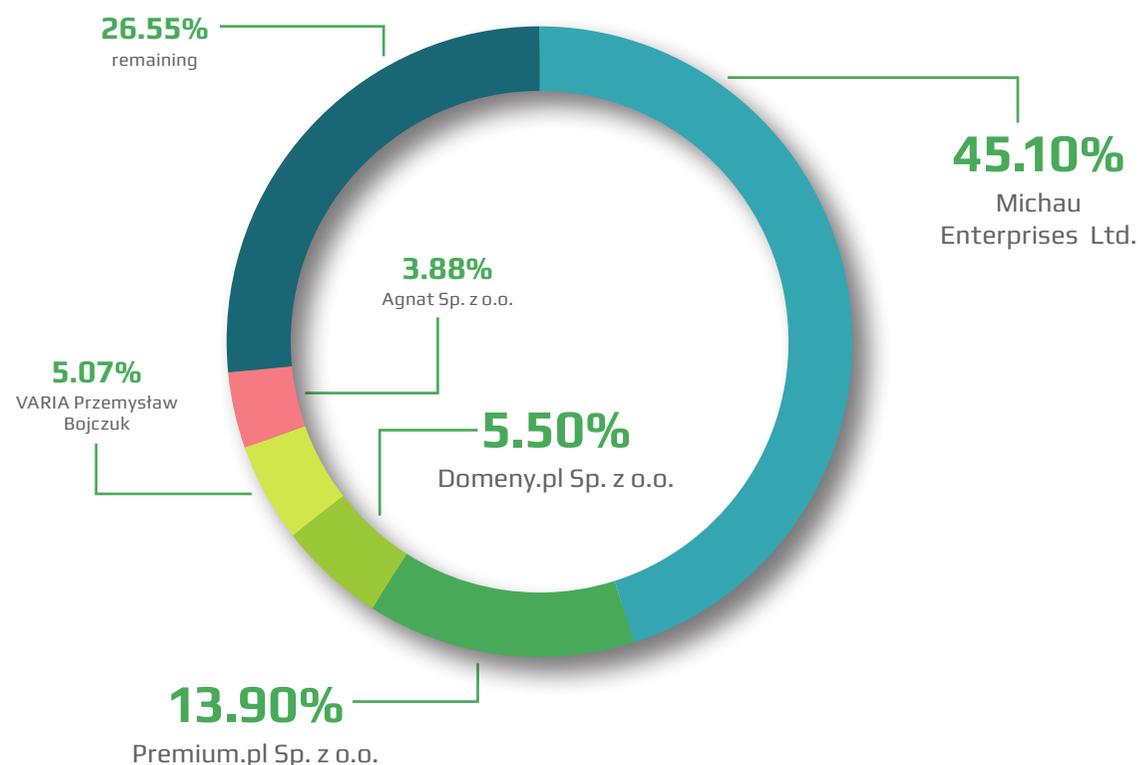
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MARKET SHARE BETWEEN PARTNERS CONSIDERING WLS REGISTRATIONS

In the second quarter of 2016 **32** Partners were assisting in conclusion of the agreements on options. The registrars, presented in the report, serviced **73.45%** out of **2 346** agreements on options, concluded in the quarter under discussion.

During the discussed period options for .pl domain name registration were most frequently bought through Michau Enterprises Ltd., which assisted in conclusion of **45.10%** of agreements. Consecutive registrars, most frequently chosen by option buyers, were: Premium.pl Sp. z o.o. – **13.90%**, Domeny.pl Sp. z o.o. – **5.50%**, Varia – **5.07%** and Agnat Sp. z o.o. – **3.88%**.

The registrars from beyond the presented five serviced in total **26.55%** of new agreements on options for the registration of a .pl domain name.



WLS market share between Partners, Q2 2016

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