

.PL DOMAIN NAME MARKET

NASK'S REPORT FOR THE THIRD QUARTER OF 2015

Q3 2015

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TABLE OF CONTENTS

3	Introduction	10	DNSSEC in the .pl domain name
4	Number of .pl domain names in DNS	11	Registrants of .pl domain names
5	Number of new .pl domain name registrations	12	WLS
6	Number of new .pl domain name registrations, daily average	13	NASK Partners
7	Number of new .pl domain name registrations as divided into the type of zone	14	Market share between Partners considering .pl domain names
8	Renewal rate of .pl domain names	15	Market share between Partners considering new registrations
9	Transfers	16	Market share between Partners considering Registrants
		17	Market share between Partners considering WLS registrations

INTRODUCTION

Dear Readers,

At the end of the third quarter of 2015 the volume of the .pl domain Registry attained the level of 2 642 378 domain names active in DNS, maintained for more than 992 thousand Registrants. During the first three months of the second half of the year the Registry was enlarged by almost 49 thousand names, whereby so much as 48% thereof fell in September. Therefore, the quarter growth dynamics remained at almost unchanged level, as compared to the previous quarter, i.e. almost 2%. At the same time the annual growth dynamics amounted to so much as 4.97% – last time a higher result was recorded at the end of 2012. Observing the growth dynamics of the number of Registrants, it is highly expected that their number in the registry will have exceeded one million by the end of this year.

During the period from July to September 2015 282 071 new .pl domain names were registered. Taking into account previous results, one may observe that in each of the foregoing quarters of this year over 280

thousand names were registered. At the same time, with the average number of daily registrations, amounting to 3 066 names, it was the best quarter in this respect in the history. It may already be observed that 2015 is going to be a successive year when the number of new registrations exceeds one million or even the current registration record, attained in 2011, will be beaten.

The renewal rate of the names in the .pl domain registry, in the last three months, attained for a consecutive time in a row the level of 61.25%, being the best result in last 6 years.

I invite you to get acquainted with the newest report, presenting the data from the .pl domain Registry for the third quarter of 2015.

Michał Chrzanowski

NASK Director

NUMBER OF .PL DOMAIN NAMES IN DNS

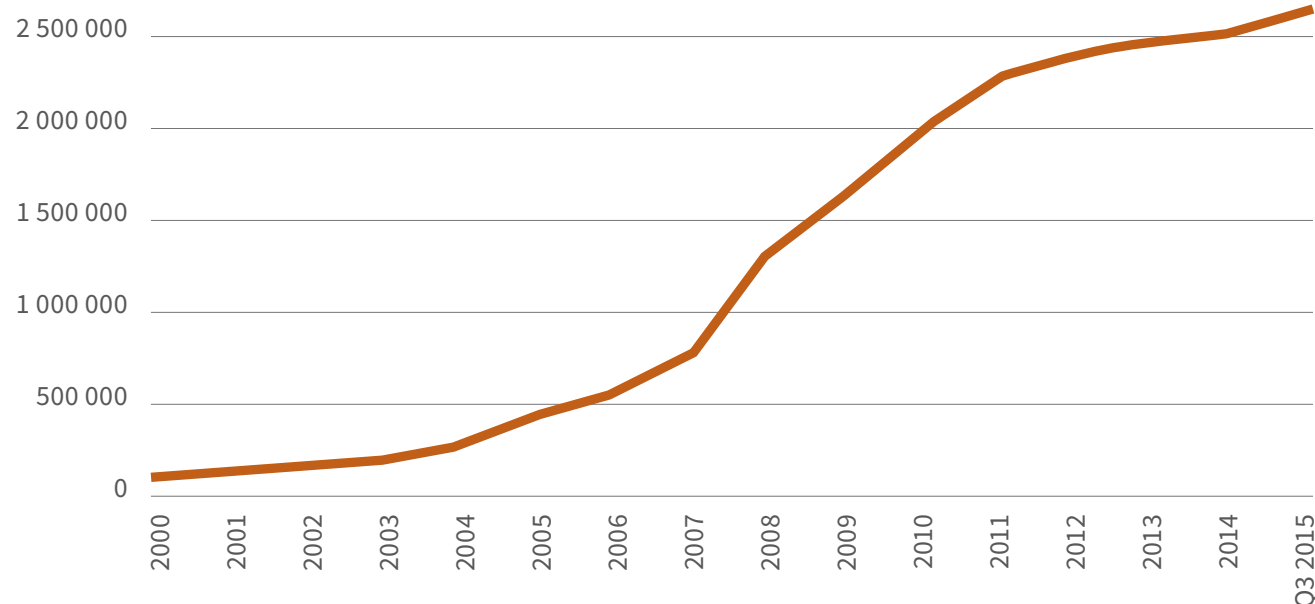
The .pl domain Registry, at the end of the third quarter of 2015, contained **2 642 378** names active in DNS. From the beginning of July to the end of September 2015 **48 904** names were added to the Registry with the highest growth, over **23 thousand**, recorded in September. The quarter growth dynamics of the Registry amounted to **1.89%**.

Out of all the active names **72.26%** were the names registered directly in the .pl domain, **22.70%** in the functional domains and **5.04%** in the regional domains.

The number of names, containing national diacritic signs, at the end of September, amounted to **46 780**, which constituted **1.77%** of all the .pl domain names active in DNS. Only in the third quarter of 2015 the number of that names grew by **4.50%**.

Number of .pl domain names in DNS

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NUMBER OF NEW .PL DOMAIN NAME REGISTRATIONS

The third quarter of 2015 brought **282 071** new .pl domain names registrations, which in particular months amounted to: **92 402** in July, **90 579** in August and **99 090** in September. The number of new .pl domain name registrations, effected from July to September 2015, was by over **32 thousand** higher than in the corresponding period in 2014. Worthy of note is the fact that the number of new registrations, carried out in September, attained a very high level, whereby a higher result in this year was recorded only in March 2015 (**105 623**).

The share of names, containing diacritic signs, in the number of new names, registered between the beginning of July and the end of September, amounted to **2.57%**, being the highest result attained in 2015.

Number of .pl domain name registrations

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NUMBER OF NEW .PL DOMAIN NAME REGISTRATIONS, DAILY AVERAGE

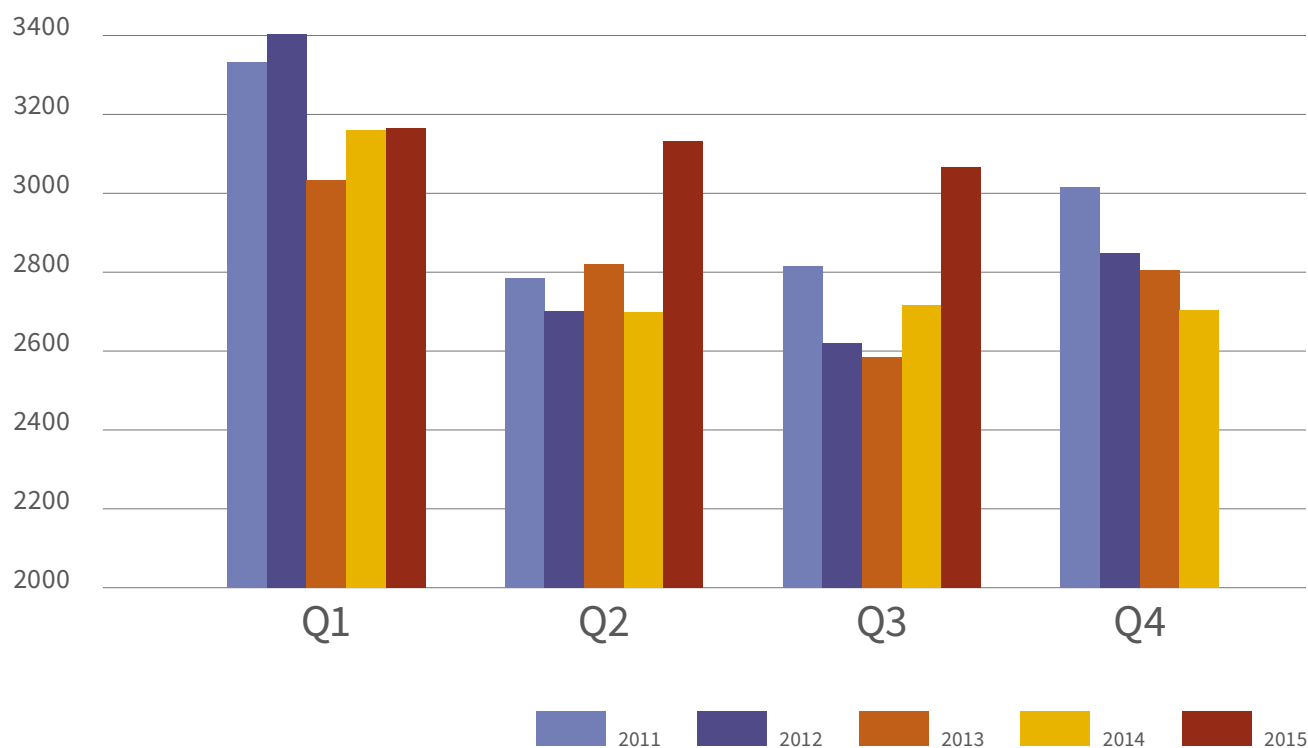
From the beginning of July to the end of September, similarly as in the previous months of 2015, the daily average number of .pl domain name registrations, remained at the level of **3 thousand**.

In the particular months of the foregoing quarter the daily average number of new .pl domain name registrations amounted to **2 981** in July, **2 922** in August and **3 303** in September.

It is the first time such a high number of daily registrations, amounting to **3 thousand** new names in the third quarter of a year, has been recorded.

Number of .pl domain name registrations, daily average

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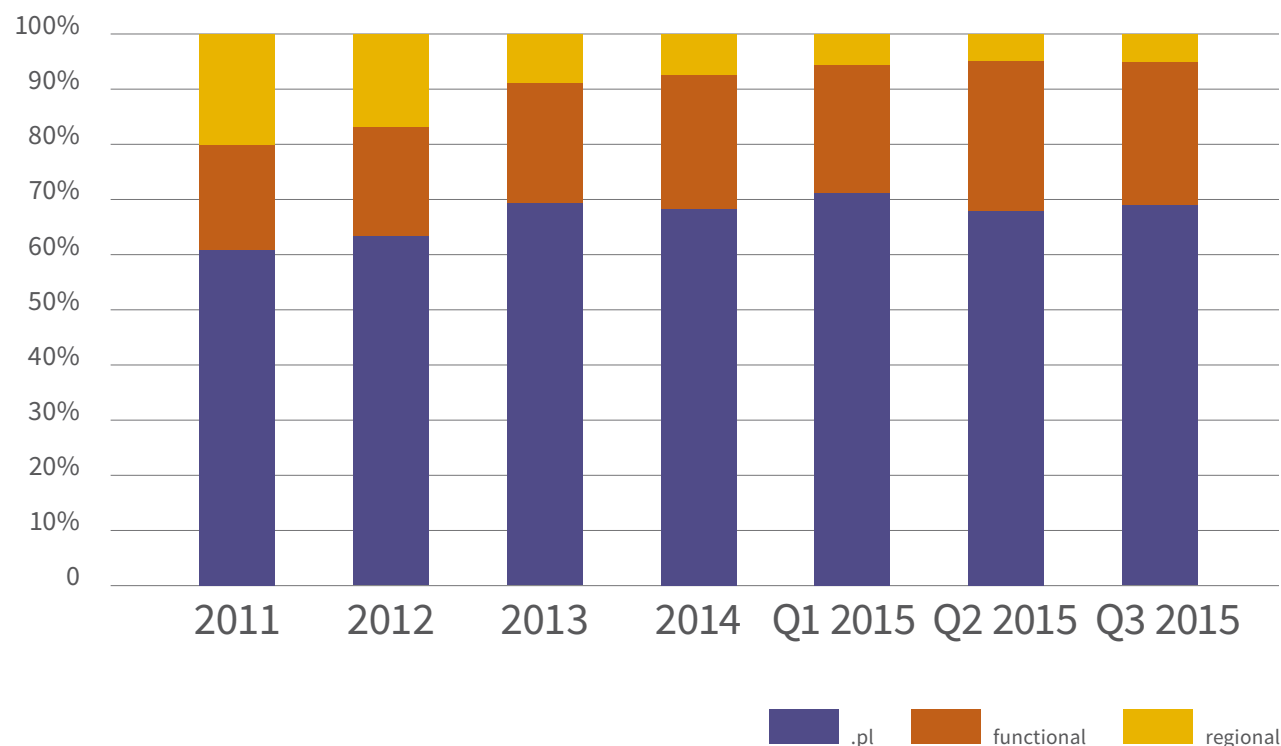
NUMBER OF NEW .PL DOMAIN NAME REGISTRATIONS AS DIVIDED INTO THE TYPE OF ZONE

For years constantly the most popular among Registrants is the registration of second level domain names, i.e. directly in the .pl domain. Within the period from 1 July to 30 September 2015 in the .pl national extension **195 010** names were registered, which constituted **69.13%** of the total number of registrations carried out in that period. The number of new registrations in functional extensions, i.e. .com.pl, .info.pl, amounted to **72 930** names, constituting **25.86%** of share in all registrations during the third quarter of 2015. The remaining **5.01%** of share in new registrations constituted regional domain names administered by NASK, amounting to **14 131** in the third quarter of 2015.

The registration structure of new names, divided into the type of zone, as compared to the previous quarter, changed in the following way: the share of names, registered directly in the .pl domain, increased by **1.14 p.p.**, also the share of new registrations in the regional domains, administered by NASK, increased slightly, i.e. by **0.21 p.p.**, whereas the number of new registrations in functional domains dropped by **1.36 p.p.**

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

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RENEWAL RATE OF .PL DOMAIN NAMES

At the end of September 2015 **61.25%** of the .pl domain names, out of all the names subject to be prolonged for the successive billing period in the third quarter of 2015, were renewed. The renewal rate, in the third quarter of 2015, is higher by **0.03 p.p.** in comparison to the previous quarter.

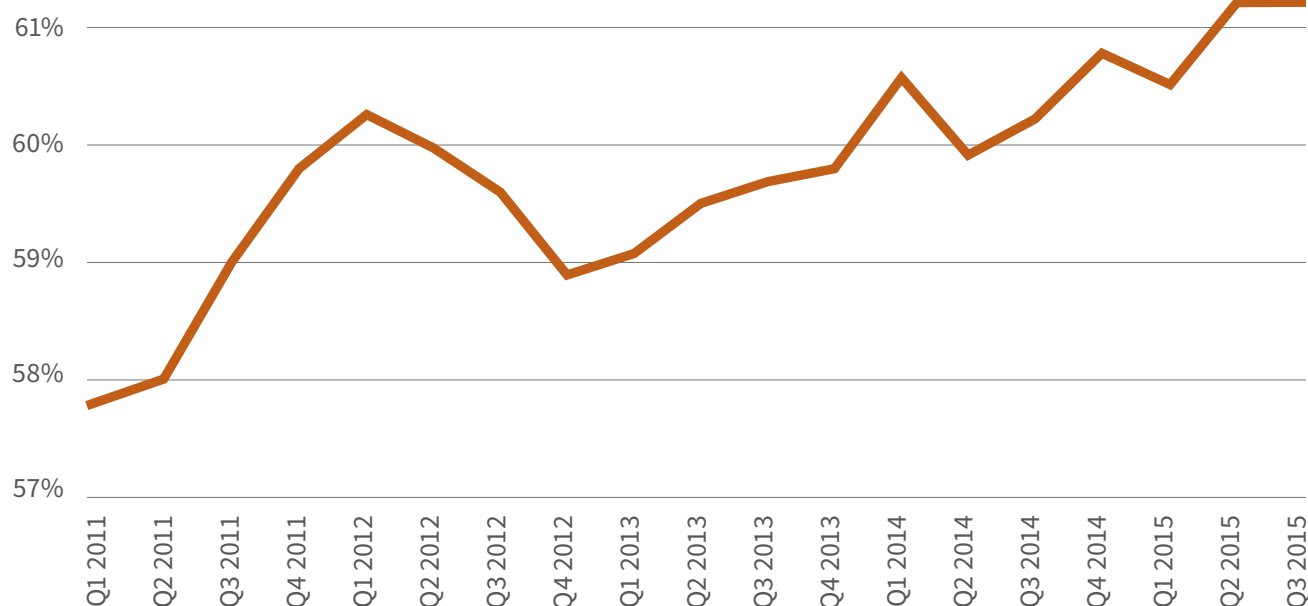
From the beginning of July to the end of September 2015 nearly **368 thousand** .pl domain names were renewed for the successive billing period. The option to modify the billing period, by an individually defined number of days, was used by Registrants in case of **1 336** .pl domain names.

74.55% of names were renewed directly in the .pl domain, **20.40%** in the functional domains and remaining **5.04%** of names in the regional domains.

Out of all the .pl domain names, renewed in the third quarter of 2015, **41.98%** were registered before 2011, **10.10%** in 2011, **11.88%** in 2012, **15.34%** in 2013, **20.55%** of names in 2014, and for **0.15%** of names the registration date falls in 2015.

Renewal rate of .pl domain names

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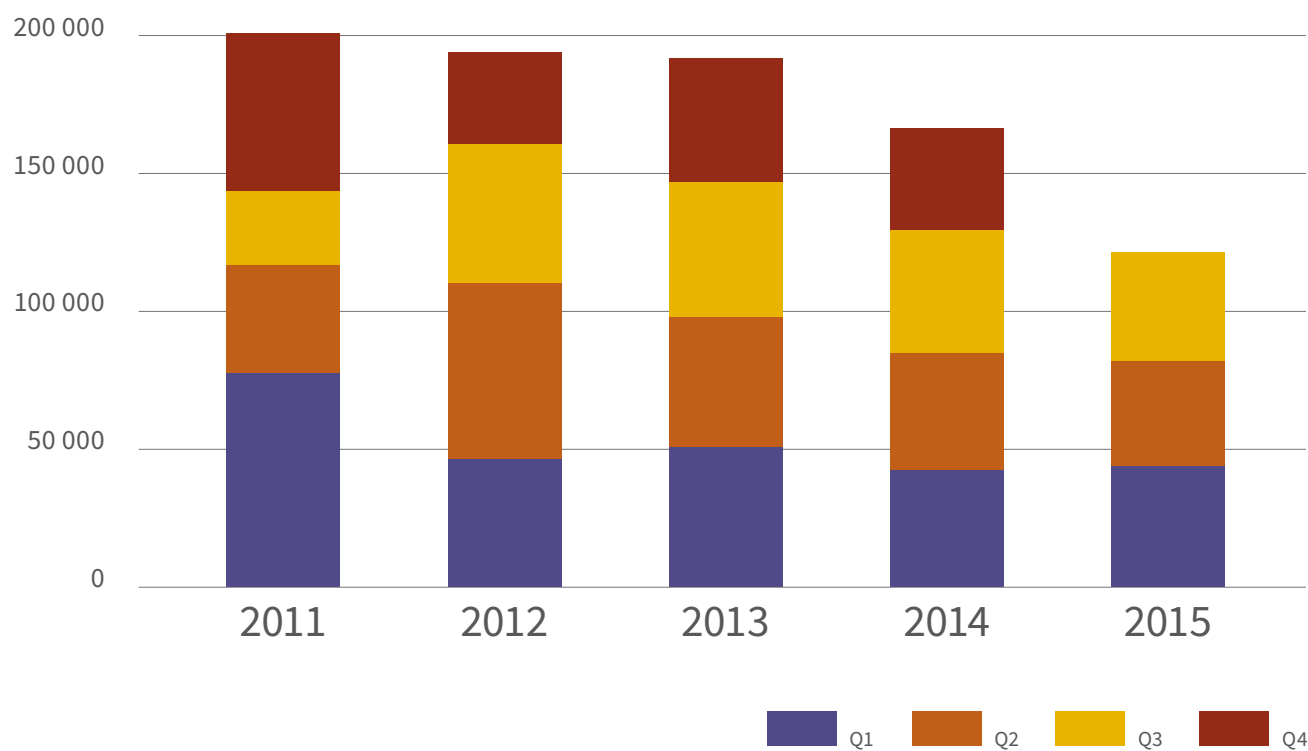
TRANSFERS

During the third quarter of 2015, the Registrants transferred the service of names, maintained in .pl domain, to other NASK's Partner **39 660** times. The transfer of service with the simultaneous renewal of the .pl domain name for a consecutive billing period applied to **588** cases, whereby only **220** transfers were made after the previous billing period had been completed, i.e. in the BLOCKED state, being the lowest number of service transfers, carried out after the renewal date of the .pl domain name, for at least 5 years.

In the third quarter of 2015, daily average, the service of **431** .pl domain names was transferred among NASK's Partners.

Number of .pl domain name transfers

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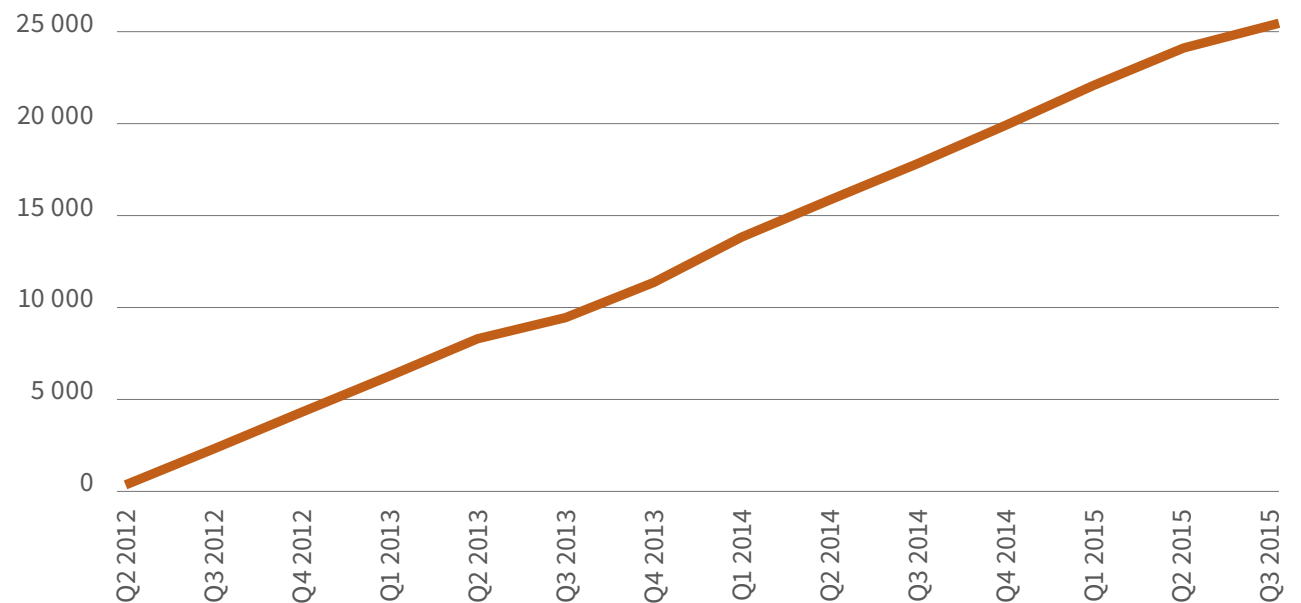
DNSSEC IN THE .PL DOMAIN NAME

In the .pl domain registry there were **25 431** names, secured with the DNSSEC protocol, at the end of September 2015. That number increased by **1 303** names as compared to the previous quarter. Daily average **14** names, secured with DNSSEC, were added to the Registry.

Out of all the Partners **15** Registrars declared that they were offering their clients the protection of domain names with the DNSSEC service and agreed to place that information in the list of NASK's Partners, published at www.dns.pl. Furthermore, four Partners declared that the user panel was prepared to service DS records.

Number of the .pl domain names secured with DNSSEC

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REGISTRANTS OF .PL DOMAIN NAMES

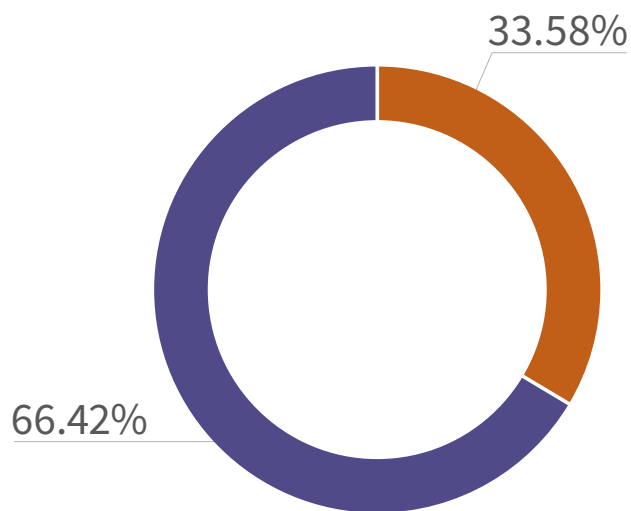
At the end of September 2015 the .pl domain Registry contained **992 thousand** unique Registrants with **66.42%** thereof being the entrepreneurs and **33.58%** natural persons.

At the end of the third quarter of 2015 **64.02%** of Registrants were holding one domain name, **14.61%** two domain names and **6.29%** three .pl domain names. Almost **0.10%** of Registrants were holding **100** and more registered .pl domain names, whereby **59** Registrants were subscribing over **1 thousand** names. On average **2.66** .pl domain names fell for one Registrant.

For the Registrants seated in Poland there were maintained **94.57%** of .pl domain names. Out of .pl domain names registered for Registrants from abroad the biggest number was maintained for those seated in Germany (**21.08%**), United States (**16.67%**) and Great Britain (**10.19%**).

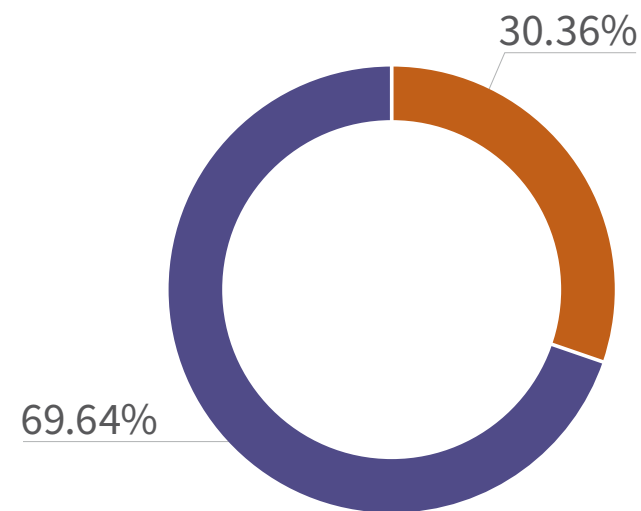
Division of Registrants of .pl domain names, Q3 2015

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Division of .pl domain names for Registrants, Q3 2015

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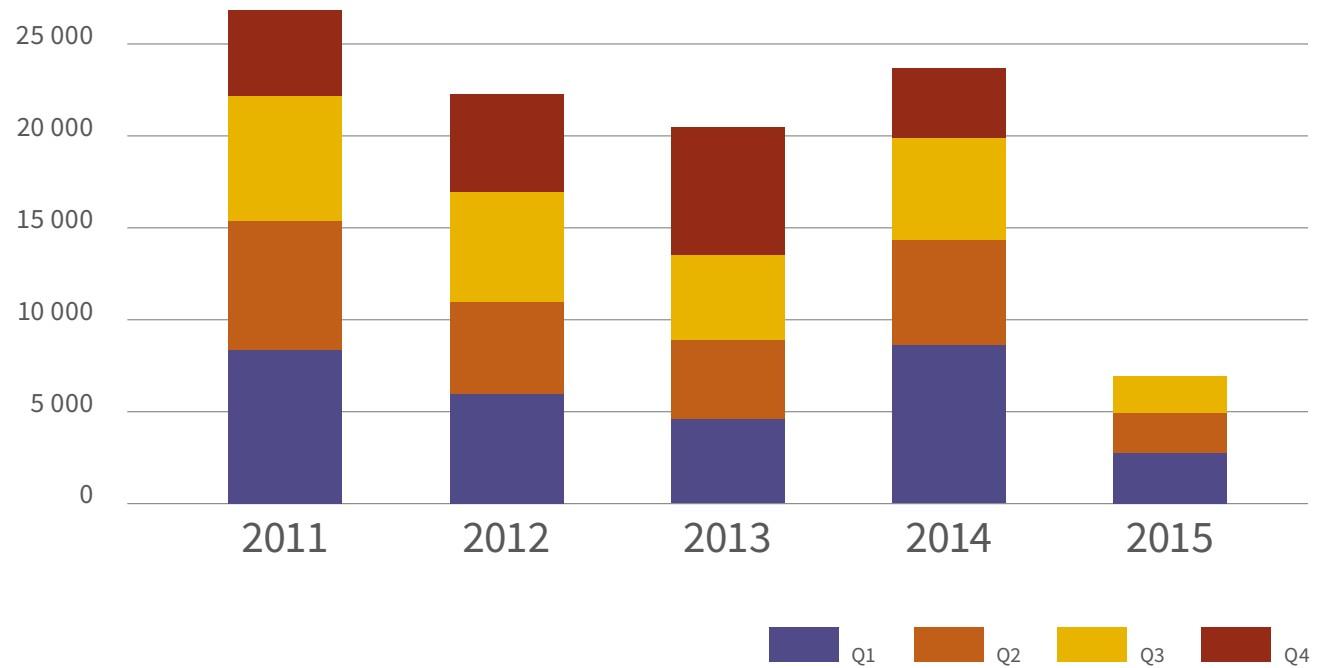
private persons entrepreneurs

During the third quarter of 2015 **1 989** agreements on options for registration of the .pl domain names were concluded and **394** agreements were prolonged for consecutive three years. Within that period **1 198** names, covered by the agreements on options, were made available for registration for option holders. In case of **73** names the formal requirements were not met, which resulted in the domain names being released to the group of names available for registration.

Since launching the service in June 2004 the Registry has concluded more than **181 thousand** agreements on options. The effectiveness of those agreements, calculated by the number of .pl domain name registrations, amounted, at the end of the third quarter of 2015, to **44.67%**.

Number of WLS registrations

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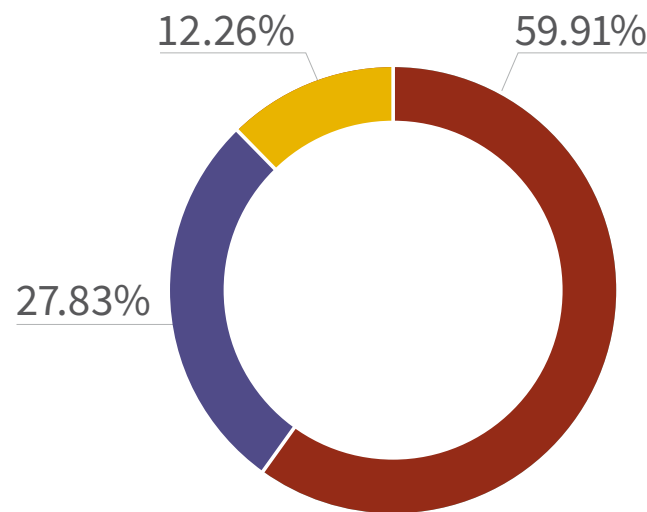
NASK PARTNERS

The .pl domain Registry, at the end of the third quarter of 2015, was cooperating, within the frames of the Partner Programme, with **212** Registrars of domain names. That number constituted **127** entities with their registered offices in Poland, **59** seated in other European countries and **26** beyond Europe. During the third quarter **5** new entities joined the Partner Programme.

Registrars from Poland were servicing, at the end of September 2015, **78.50%** of active .pl domain names, **12.52%** were being serviced by Registrars from other European countries and **8.98%** from remaining countries.

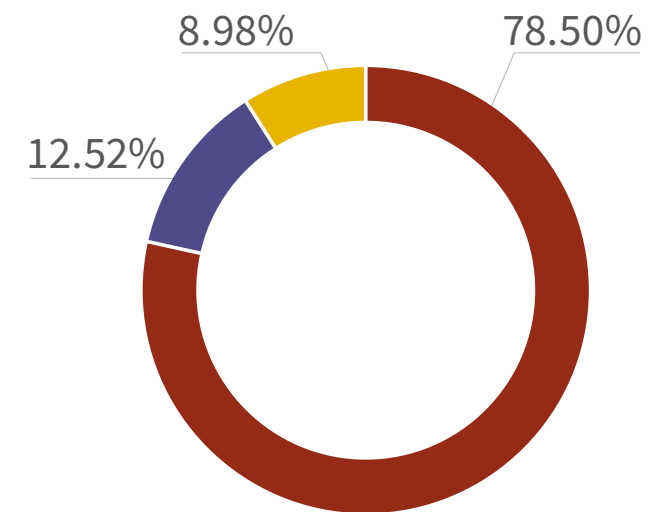
Partners of NASK, division by place of residence, Q3 2015

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.pl domain name market share between Partners considering the place of residence, Q3 2015

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Poland Europe other countries

MARKET SHARE BETWEEN PARTNERS CONSIDERING .PL DOMAIN NAMES

NASK Partners were servicing, at the end of the third quarter of 2015, **99.42%** of .pl domain names. More than **55%** of names were being serviced by three Registrars: Home.pl S.A., Nazwa.pl S.A. and Consulting Service Sp. z o.o.

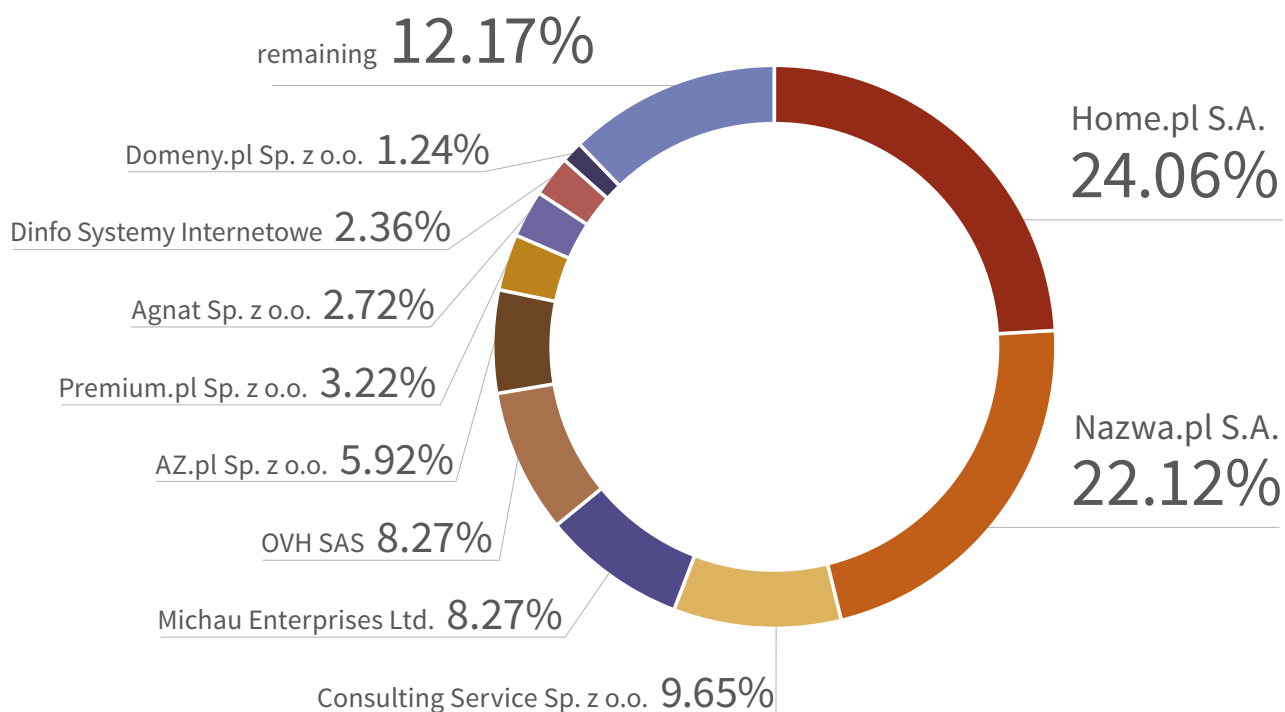
At the end of September 2015 the highest share in servicing .pl domain names represented Home.pl – **24.06%**. The successive places in TOP 10 were taken by the following Registrars: Nazwa.pl S.A (**22.12%**), Consulting Service Sp. z o.o. (**9.65%**), Michau Enterprises Ltd. (**8.27%**), OVH SAS (**8.27%**), AZ.pl Sp. z o.o. (**5.92%**), Premium.pl Sp. z o.o. (**3.22%**), Agnat Sp. z o.o. (**2.72%**), Dinfo Systemy Internetowe (**2.36%**) and Domeny.pl Sp. z o.o. (**1.24%**).

Among the presented 10 Registrars in the third quarter of 2015 the growth of the number of serviced domain names was recorded by two companies: Nazwa.pl S.A, attaining the increase in the market share by **1.00 p.p.** and Home.pl S.A. by **0.26 p.p.**

The Registrars, from beyond the presented TOP 10, were servicing **12.17%** of .pl domain names and their share in the market, during the third quarter of 2015, decreased by **0.24 p.p.**

Market share between Partners
considering .pl domain names, Q3 2015

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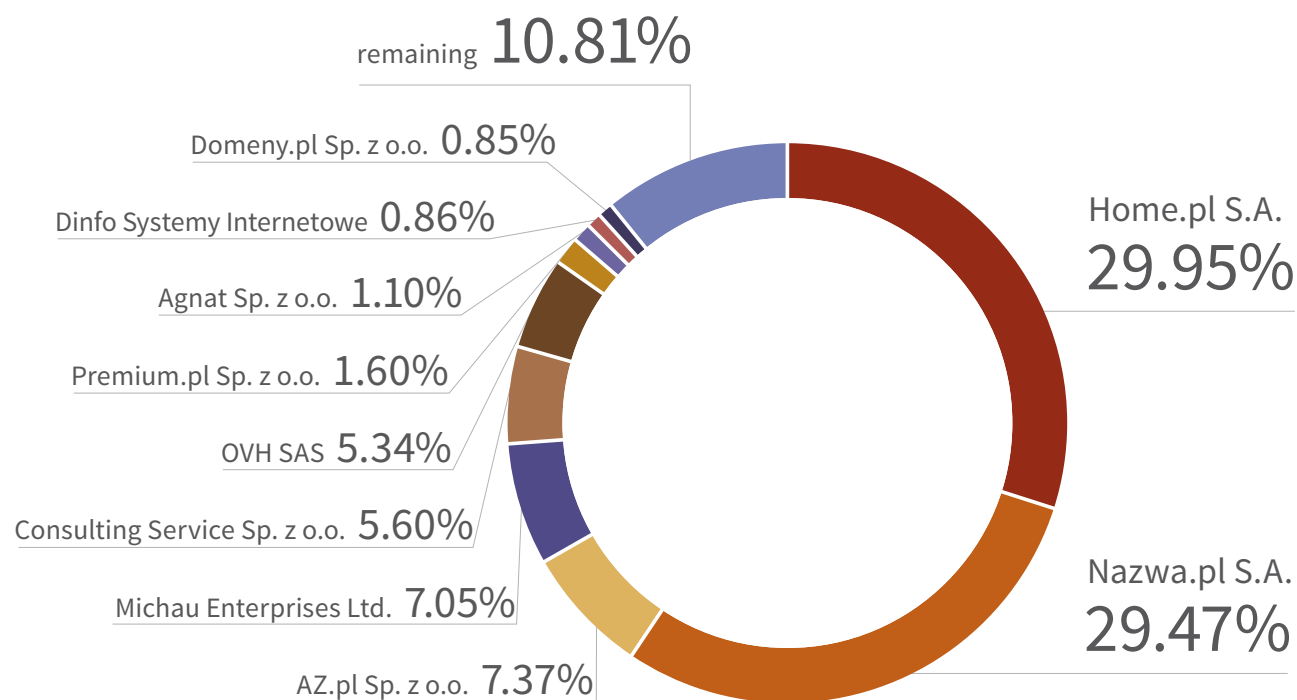
MARKET SHARE BETWEEN PARTNERS CONSIDERING NEW REGISTRATIONS

In the third quarter of 2015 registrations in the .pl domain were carried out only through NASK's Partners, since from 15 June 2015 NASK has ceased to directly register names in the .pl domain.

Within the period from July to September 2015 a higher number of registration, as compared to the previous 3-month period, was accomplished by: Home.pl S.A., AZ.pl Sp. z o.o., Michau Enterprises Ltd. and Dinfo Systemy Internetowe. By concluding **59.43%** of agreements on registration of .pl domain names, within the period from the beginning of July to the end of September 2015, two Registrars were providing assistance: Home.pl S.A. and Nazwa.pl S.A., servicing **29.95%** and **29.47%** of registrations respectively. Consecutive positions, on the list of NASK's Partners, most frequently chosen while registering .pl domain names, were occupied by: AZ.pl Sp. z o.o. (**7.37%**), Michau Enterprises Ltd. (**7.05%**), Consulting Service Sp. z o.o. (**5.60%**), OVH SAS (**5.34%**), Premium.pl Sp. z o.o. (**1.60%**), Agnat Sp. z o.o. (**1.10%**), Dinfo Systemy Internetowe (**0.86%**) and Domeny.pl Sp. z o.o. (**0.85%**). The share of Partners, beyond the presented TOP 10, amounted to **10.81%**, by **0.94 p.p.** less than in the previous quarter.

Market share between Partners considering new .pl domain name registrations, Q3 2015

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MARKET SHARE BETWEEN PARTNERS CONSIDERING REGISTRANTS

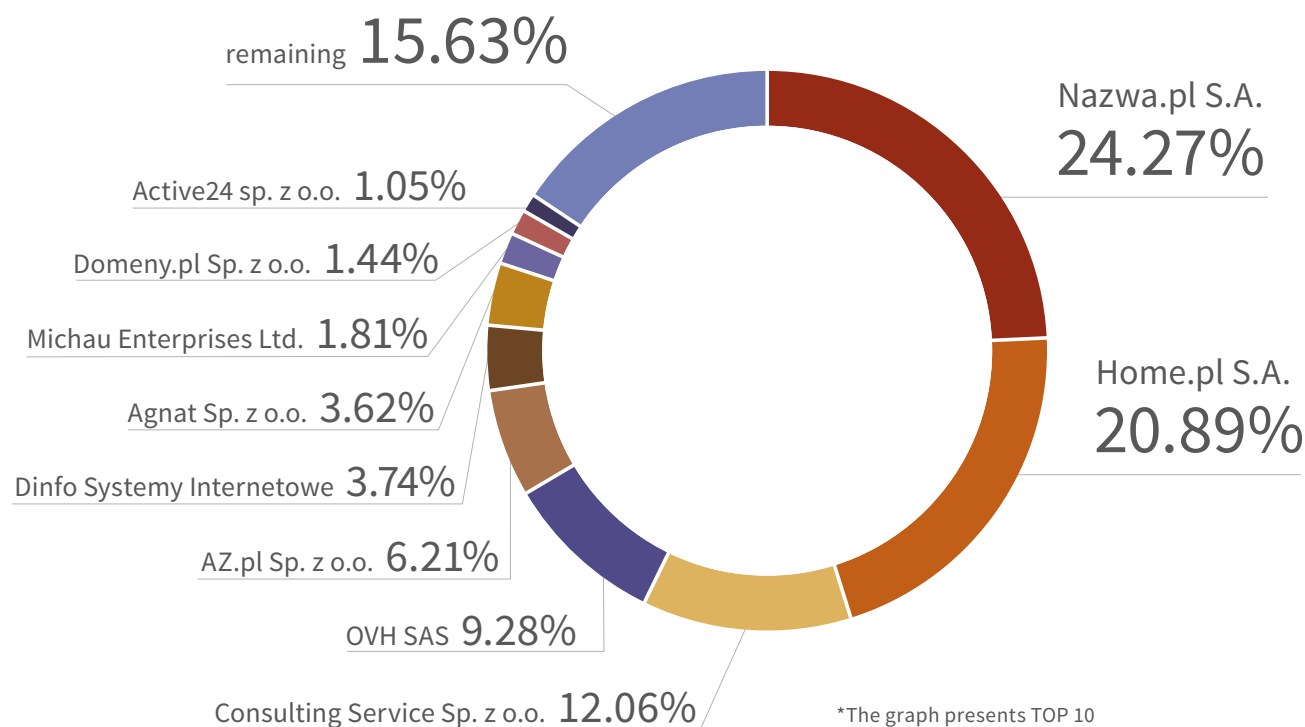
With the end of September 2015 the .pl domain registry contained **992 thousand** unique Registrants. The Registrants, holding at least two .pl domain names, may be serviced by different Partners, therefore the sum of unique Registrants serviced by particular Registrars amounted to **1 013 thousand**.

At the end of the third quarter 2015 the biggest share in servicing .pl domain name Registrants was recorded by Nazwa.pl S.A. – **24.27%**. The second NASK's Partner, by account of the number of serviced Registrants, was Home.pl S.A. with **20.89%** of share. In the group of first ten Registrars, servicing the highest number of .pl domain name Registrants, were also: Consulting Service Sp. z o.o. (**12.06%**), OVH SAS (**9.28%**), AZ.pl Sp. z o.o. (**6.21%**), Dinfo Systemy Internetowe (**3.74%**), Agnat Sp. z o.o. (**3.62%**), Michau Enterprises Ltd. (**1.81%**), Domeny.pl Sp. z o.o. (**1.44%**) and Active 24 Sp. z o.o. (**1.05%**).

At the end of the third quarter of 2015 the Registrars, from beyond the TOP 10 presented in the report, were servicing **15.63%** of .pl domain name Registrants. Increase in the share in servicing .pl domain name Registrants was recorded by two entities: Nazwa.pl S.A. by **0.48 p.p.** and OVH SAS by **0.09 p.p.**

Market share between Partners considering .pl domain name Registrants, Q3 2015*

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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 WLS REGISTRATIONS

In the third quarter of 2015, out of all **1 989** agreements on options for domain name registration **36.55%** were concluded through Michau Enterprises Ltd.

The share of successive NASK's partners, most frequently chosen by option buyers during the third quarter, is represented as follows: Premium.pl Sp. z o.o. (**14.88%**), AZ.pl Sp. z o.o. (**10.36%**), Domeny.pl Sp. z o.o. (**6.33%**) and Varia (**3.97%**).

The share of remaining Partners in the market of options on .pl domain name registration amounted in total to **27.91%** and increased by **7.81 p.p.** as compared to the previous quarter.

WLS market share between Partners, Q3 2015

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