

.PL DOMAIN NAME MARKET

NASK'S REPORT FOR THE FIRST QUARTER OF 2012

Q1 2012

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All the information were prepared and compiled basing on data from the .pl domain name registry system.

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Introduction

Dear Readers,

While presenting you another quarterly report which includes data from .pl domain name registry, I can say with satisfaction that it is regarded as one of the most successful quarters in the history of our registry.

For many years we observe an increase in the number of .pl domain name registrations. However in the first quarter of 2012 this increase reached its highest level as of yet, for the first time surpassing 300 000 and reaching exactly 309 673 new registrations. Due to this fact the daily average of .pl domain name registrations also reached best result in history - 3 403 domain names.

It is also worth mentioning that maintaining positive tendency in the renewal level, which we observe since beginning of 2011, is still present. In the last quarter this level, for the first time since 2009, reached 60% and was equal to 60,26%.

Another record was noted also among additional services, offered next to registrations and maintenance of .pl domain names. Number of conducted .pl Domain Name Tastings amounted to 85 631, which is the best result in the whole .pl DNT service history and is twice as high as the former best result, reached in the third quarter last year.

Excellent results are undoubtedly a merit of NASK Partners' activity, whose number, in the first quarter of 2012 increased by 6 members, raising total number of Partners to 184.

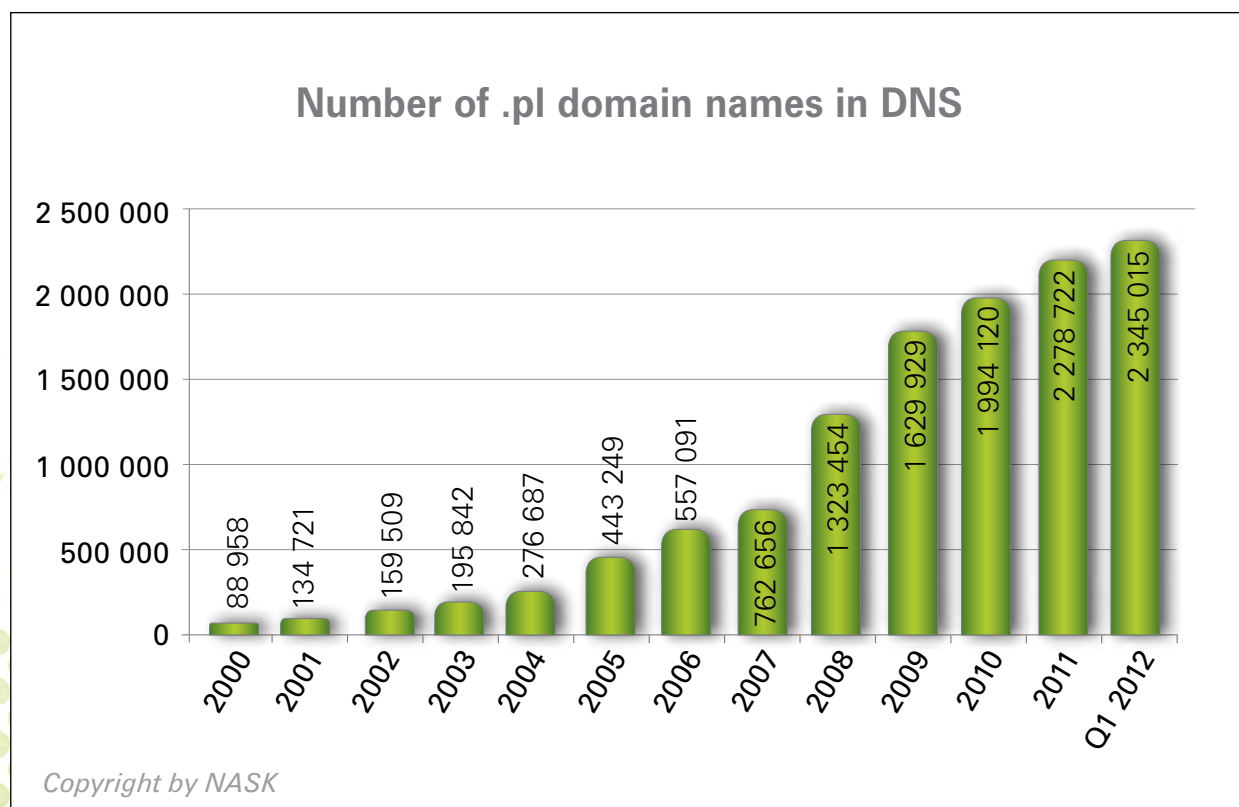
In this report we also present a new statistic. For the first time we presented a graph, which shows arrangement of types of .pl domain name extensions, in which new domain names are registered through Partners that service the most registrations in the first quarter of 2012. Registrations directly in .pl domain enjoy exceptionally high popularity by accounting for over 50% of all registrations for 9 out of 10 of Partners presented in the report. On the other hand some significant differences were observed in the share of registered names, in functional and regional domains.

Taking into account results in registrations of new .pl domain names and renewals of existing ones reached at the beginning of the year, we may hope for reaching good results in the number maintained .pl domain names throughout whole year 2012.

Michał Chrzanowski
NASK Director

Number of .pl domain names in DNS

- In the first quarter of the previous year, the number of domain names, active in DNS, surpassed 2 000 000. At the end of the first quarter of 2012 this number was equal to **2 345 015** names.

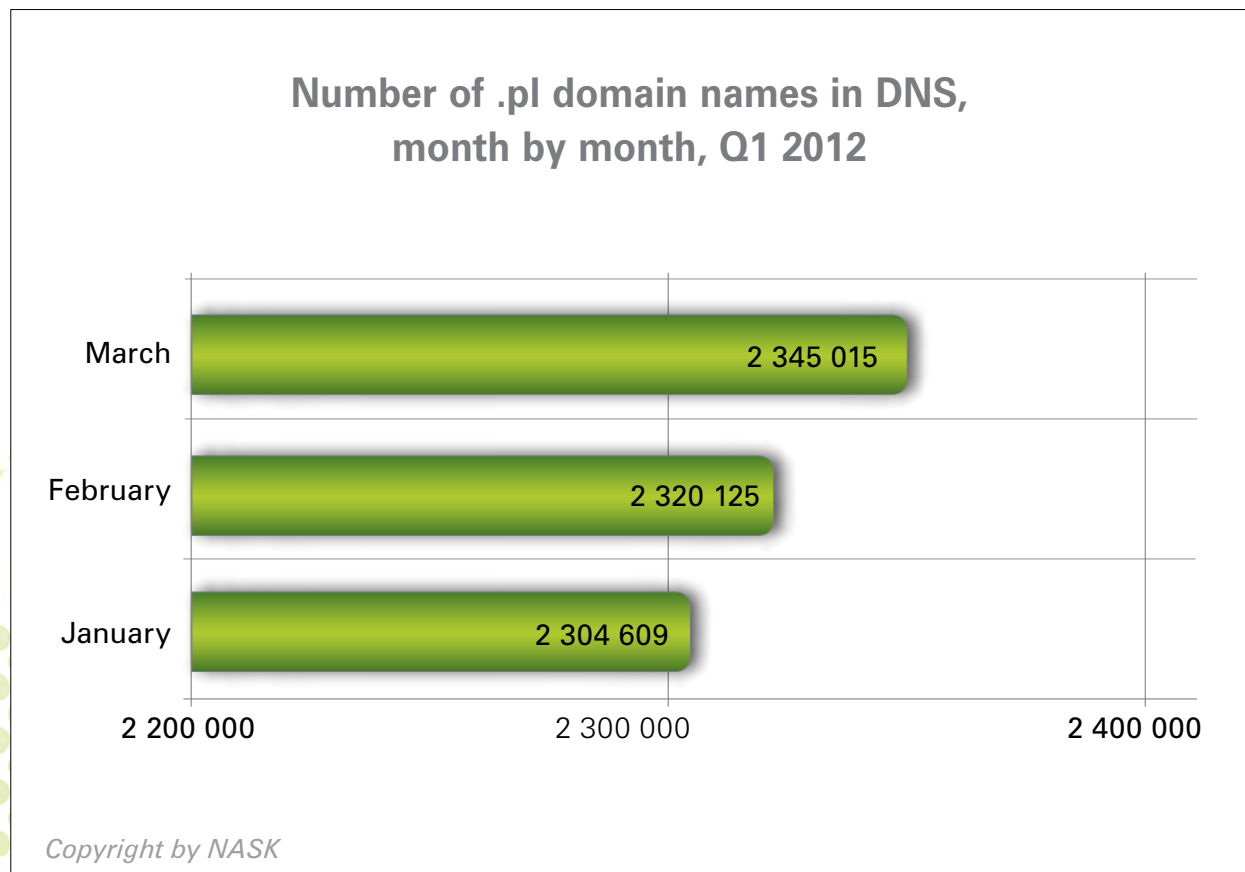


First quarter of 2012

– month by month

During the first quarter of 2012 .pl registry grew by exactly **66 293** domain names.

The highest increase in number of domain names was observed in January – **25 887**. In February number of names increased by **15 516**, and in March, by **24 890**.

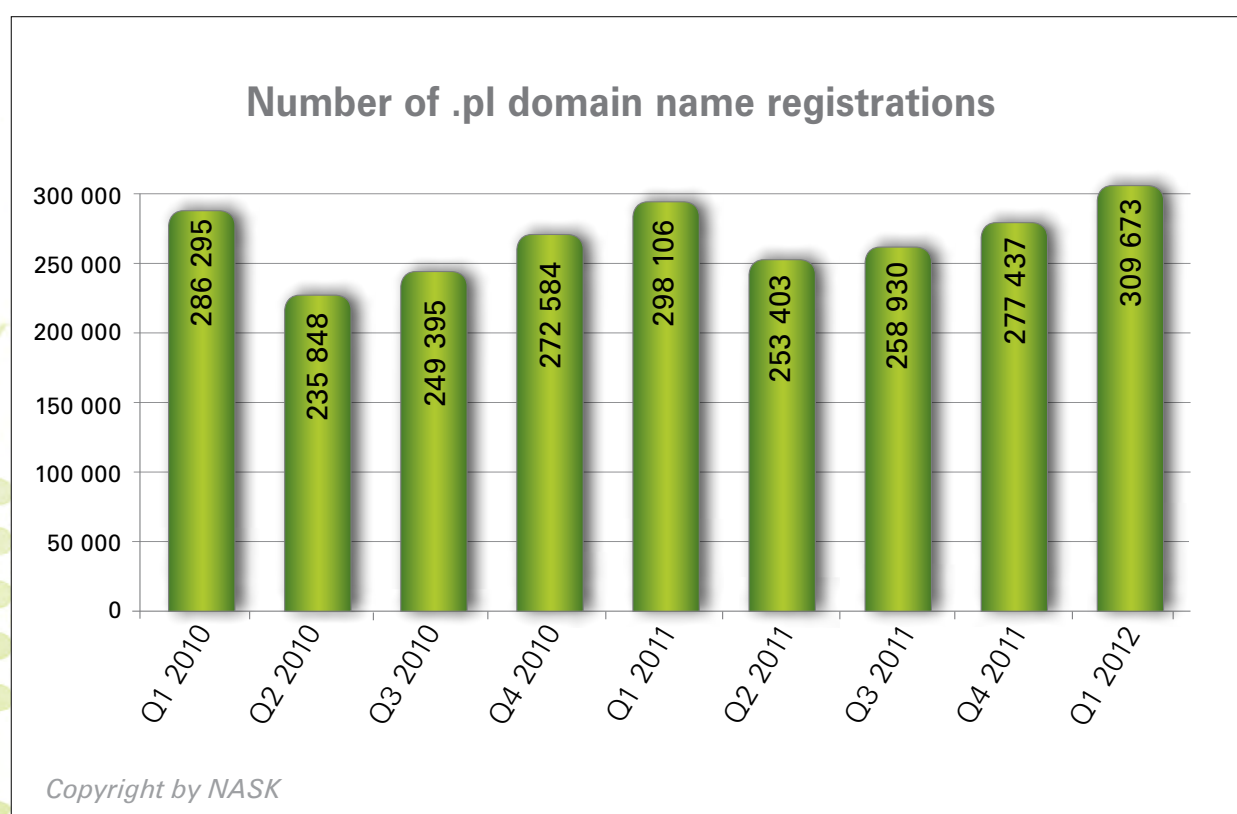


Number of new .pl domain name registrations

- First quarter of 2012, with result of **309 673** registered names, turned out to be the best quarter thus far, when it comes to number of new .pl registrations and by this, beat the results achieved in the first quarter of 2011.

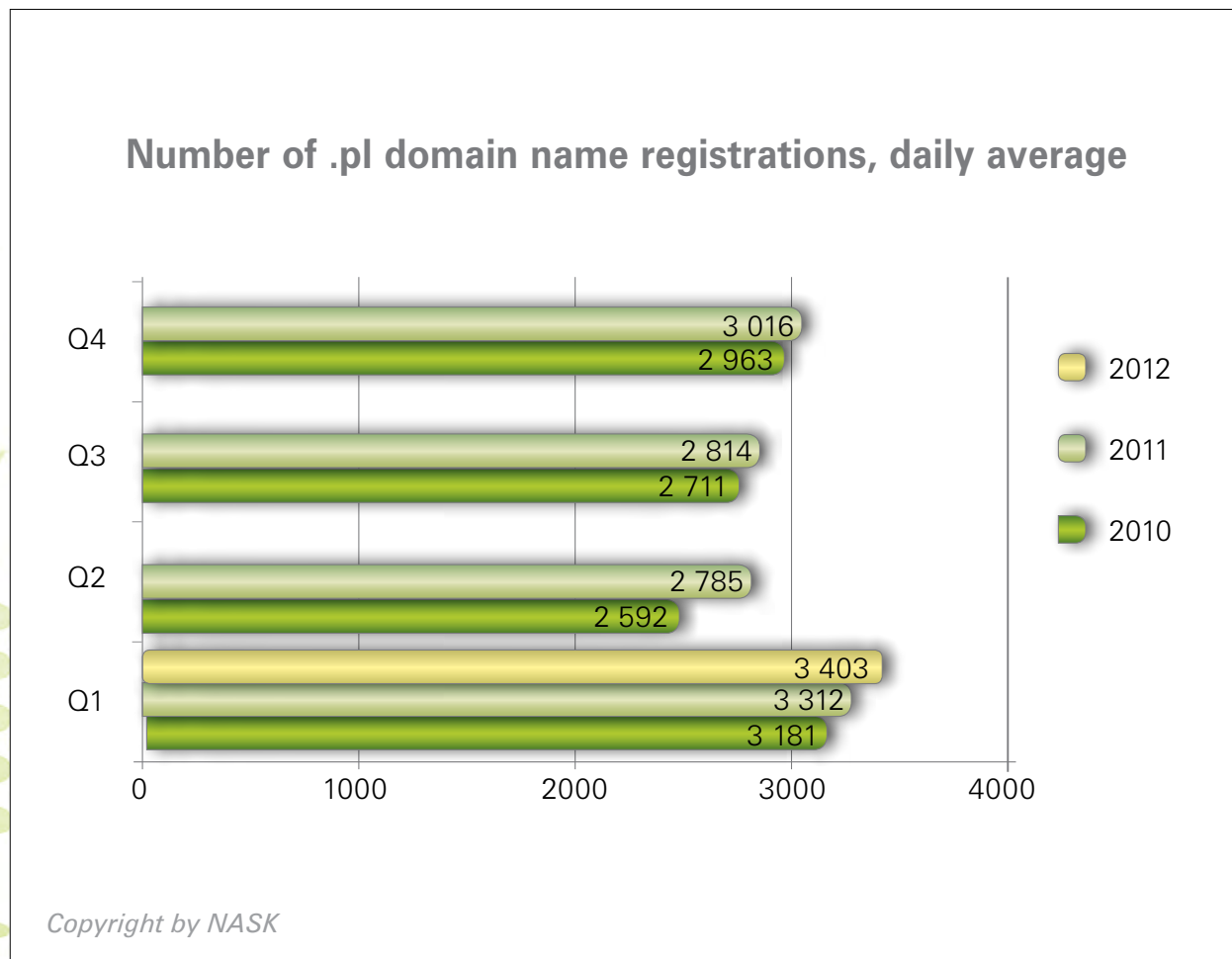
Number of .pl domain name registrations in corresponding months was equal to:

January - **100 916**, February - **89 654**, March - **119 103**.



Number of new .pl domain name registrations, daily average

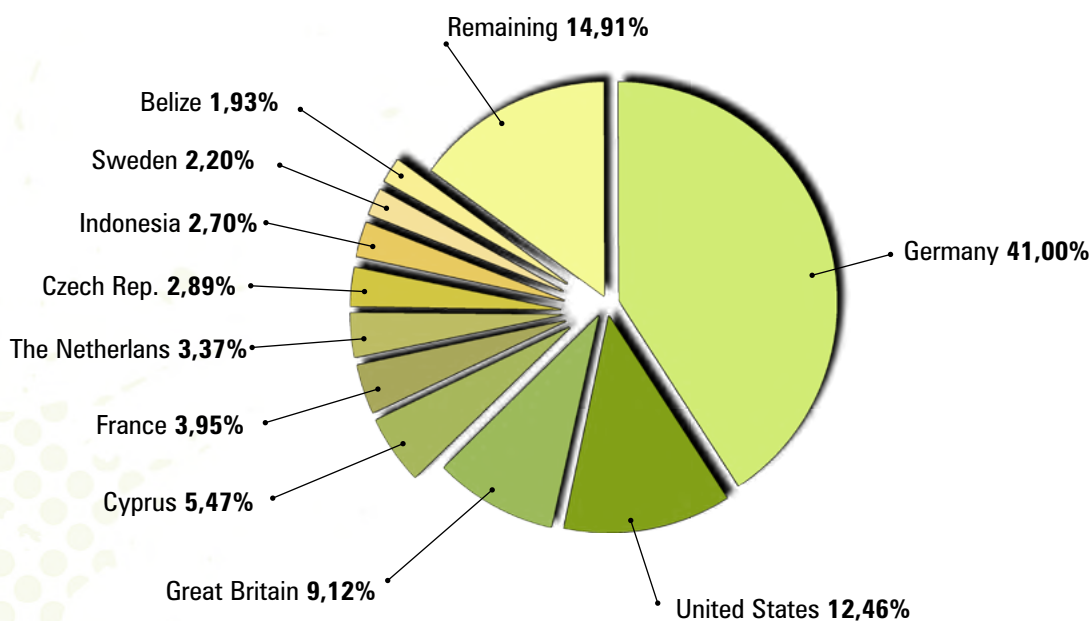
- Average daily number of .pl domain name registrations in the first quarter of 2012 peaked at the highest number in history, achieving **3 403** names. March turned out to be the best month, with **3 842** daily registrations. In January, daily **3 255** names were registered and in February, **3 092**.



New registrations to Registrant's place of residence comparison

Since beginning of January until the end of March 2012 over **95%** of names in .pl domain were registered on behalf of entities, which have their place of residence in Poland. On behalf of Registrants from over **90** other countries, **13 753** names were registered. Similarly to the previous quarter, most numerous groups of foreign Registrants were Germans - **41%**, citizens of United States – **12,46%** and Great Britain – **9,12%**.

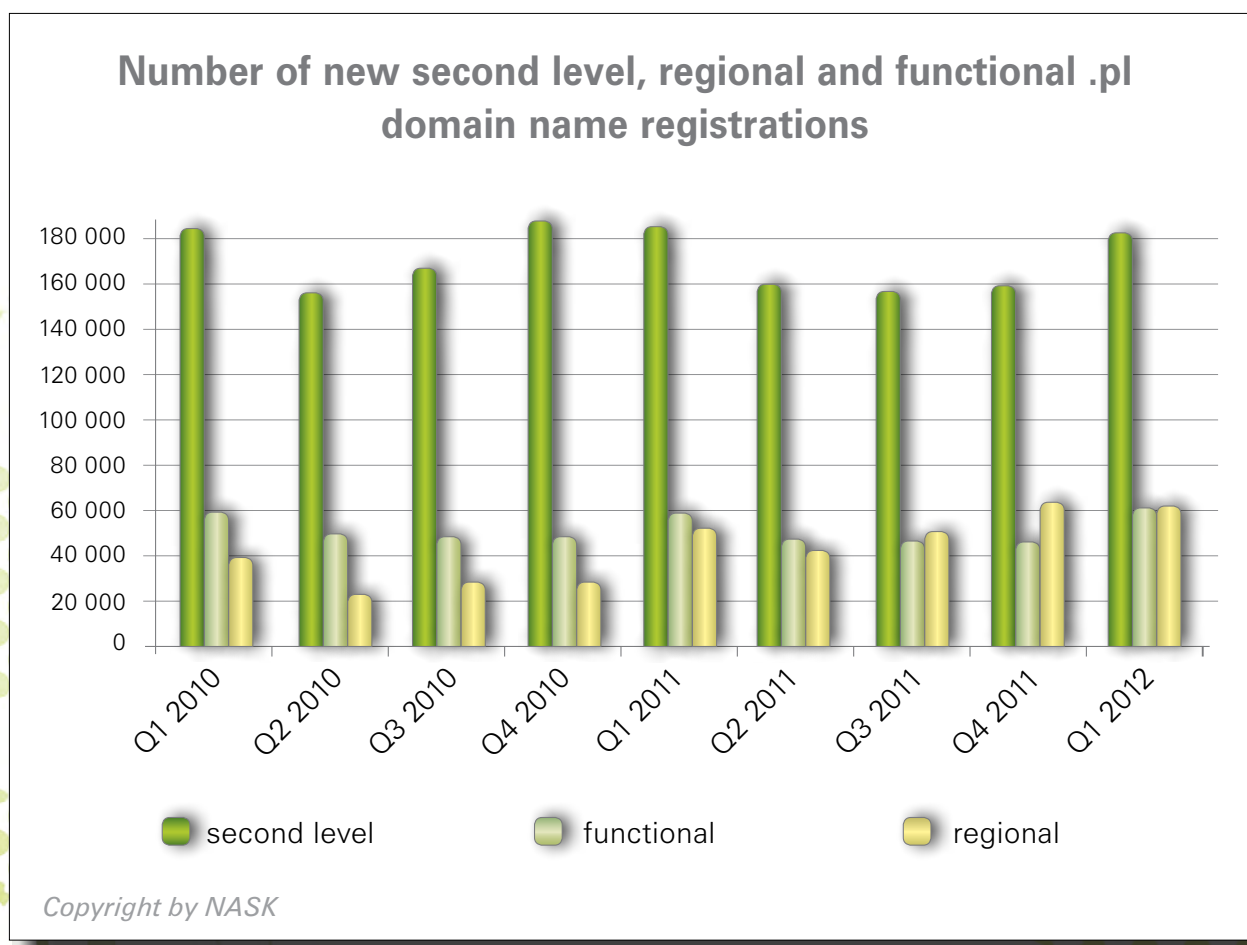
New .pl domain name registrations on behalf of Registrants residing outside Poland, Q1 2012



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Comparison between second level, regional and functional domain name registrations

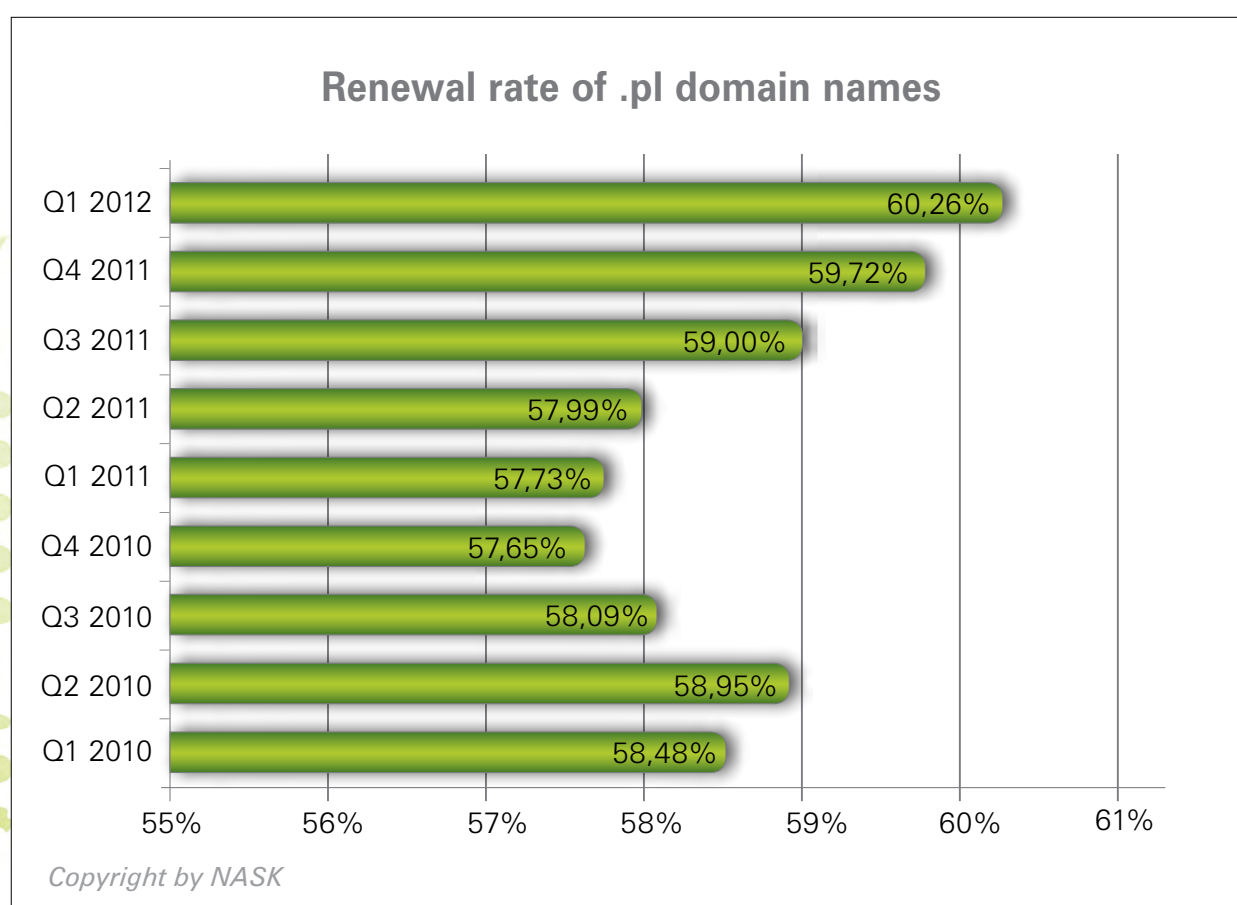
Registrations of second level names in .pl domain, in the first quarter of 2012, accounted for **59,72%** of all registrations. Their share increased by **2 p.p.** with respect to the previous quarter. Increase by **1,84 p.p.** was also observed in registrations of names in functional domains, which accounted for **19,69%** of all registrations. On the other hand, share of regional domains in registrations dropped by almost **4 p.p.** with respect to the previous quarter, achieving **20,59%**.



Renewal rate of .pl domain names

- Renewal rate of names in .pl domain, since beginning of 2011, keeps its upward tendency, achieving **60,26%** in the first quarter of 2012. Similar result was last achieved in 2009.

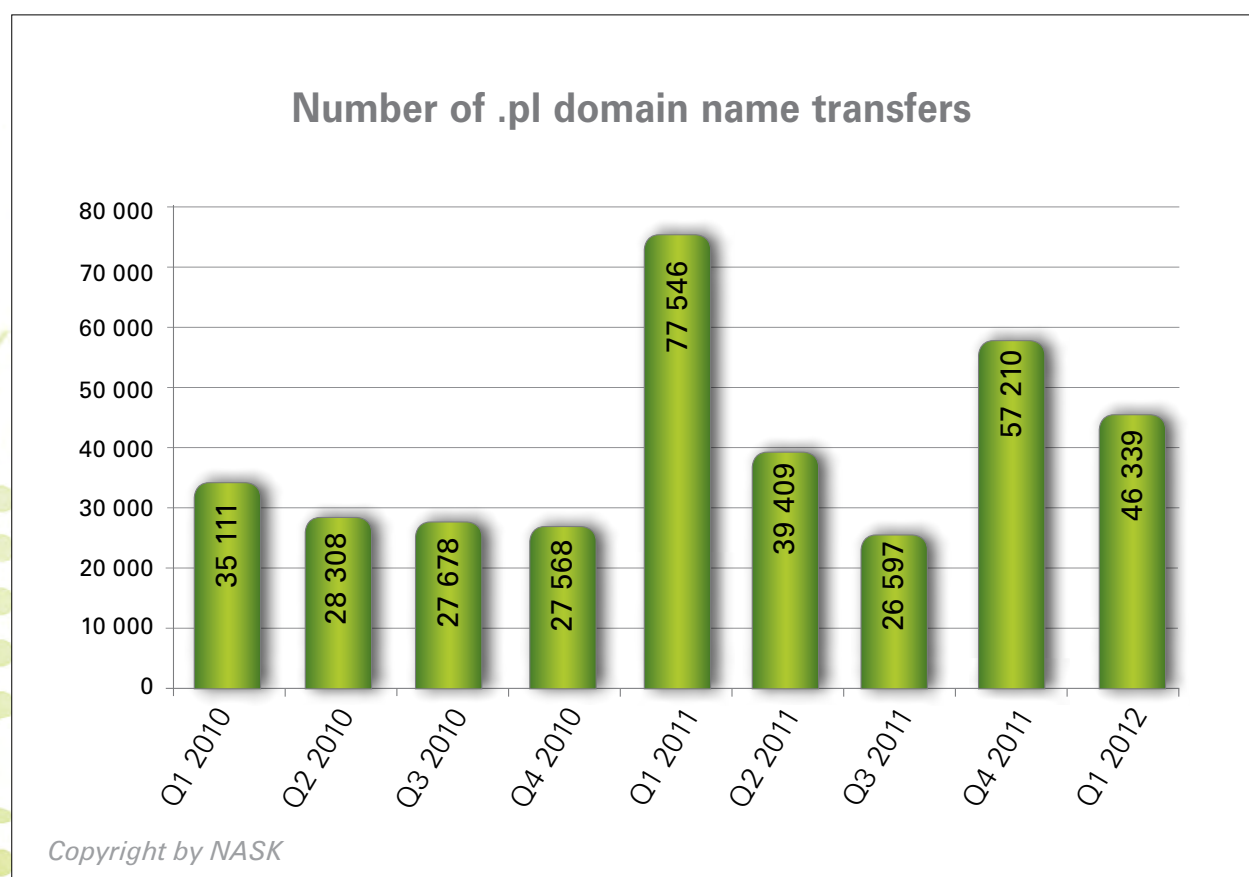
Since beginning of January until end of March 2012 over **360 thousand** names were renewed. **27,71%** of renewals concerned names registered in the current or last year, **19,42%** concerned names registered in 2010, **13,65%** in 2009, following **11,31%** in 2008, **7,19%** in 2007 and **6,15%** in 2006. Remaining **14,57%** are renewals of names registered in .pl domain before year 2006.



Transfers between Partners

- In the first quarter of 2012 there were **46 399** transfers of .pl domain name service made between Partners of NASK. **798** transfers were performed with simultaneous renewal of .pl domain name service for the next billing period, with **587** of those names being renewed after their current billing period has finished.

In the first three months of 2012 a number of **96** Partners of NASK increased their amount of serviced .pl domain names just as a result of transfers.



Ranking of ccTLD's from the EU area

In the ranking of ten biggest ccTLD countries from the European Union area, Poland remains on the fifth position.

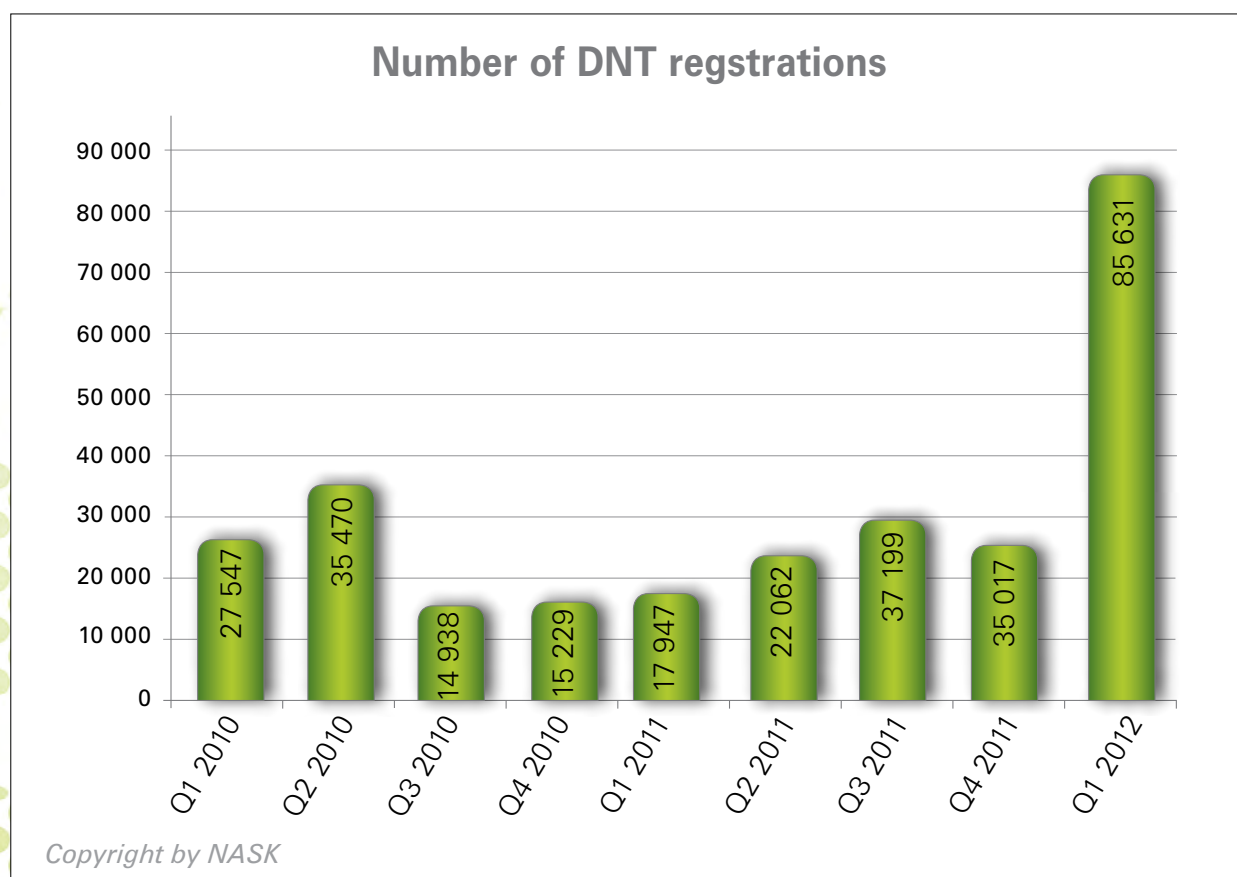
Position	Registry	Number of domain names
1.	.de	14 953 546
2.	.uk	9 970 210
3.	.nl	4 874 199
4.	.it	2 373 426
5.	.pl	2 345 015
6.	.fr	2 287 541
7.	.es	1 515 260
8.	.be	1 266 737
9.	.se	1 215 359
10.	.dk	1 175 042

Table includes data from the period between the 1st and 6th of April 2012.

DNT registrations in Q1 2012

First quarter of 2012, with record braking number of **85 631** conducted tests, became number 1 in the DNT service history. **3,36%** of performed tests resulted in registration of .pl name.

Since the moment the DNT service was introduced, until the end of March 2012, **459 672** of .pl names were tested, out of which almost **40 thousand** were later registered as a direct result of the test.



WLS

registrations in Q1 2012

- Since beginning of January until the end of March 2012 exactly **5 955** .pl domain name waiting list service purchases were made. In that time **2 432** options realized, out of which **89%** did not exist longer than a year. In **170** cases, after the option realized the .pl domain name was not registered.

Since the moment, the service was introduced till the end of first quarter of 2012, exactly **114 221** waiting list services were bought, out of which **49 814** realized.

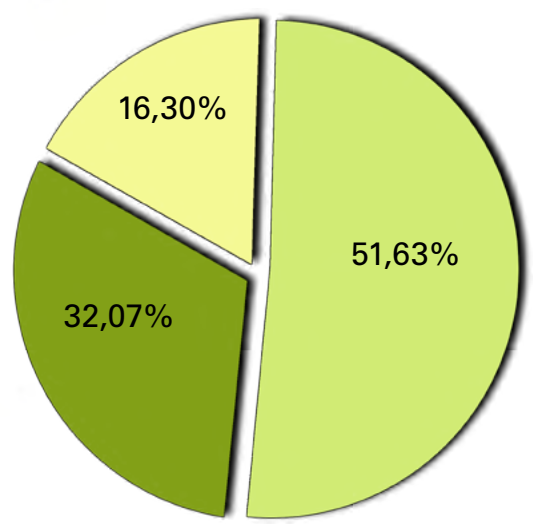


Partners

With the end of first quarter of 2012, **184** Registrars took part in NASK Partner Programme. **95** entities were from Poland, **59** from other European countries and remaining **30** were located outside of Europe.

Increased interest with NASK Partner Programme, observed since introduction of pre-paid model in 2009, still does not waver. In the first three months of 2012 NASK began to cooperate with 6 new Registrars.

Partners of NASK, division by place of residence, Q1 2012

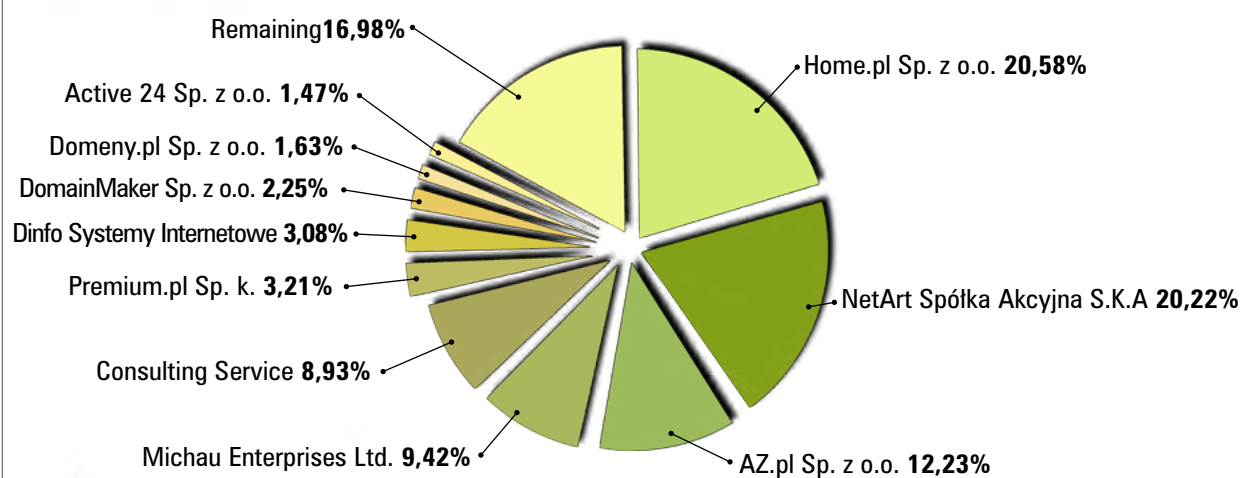


Poland Europe Other countries

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Market share between Partners considering .pl domain names

Market share between Partners considering .pl domain names, Q1 2012*



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

98,74% of active names, maintained by .pl domain name registry at the end of March 2012, were serviced by Partners of NASK. Number of names, serviced directly at NASK, dropped below **30 thousand**.

List of ten biggest .pl domain name registrars , at the end of March 2012 began with:

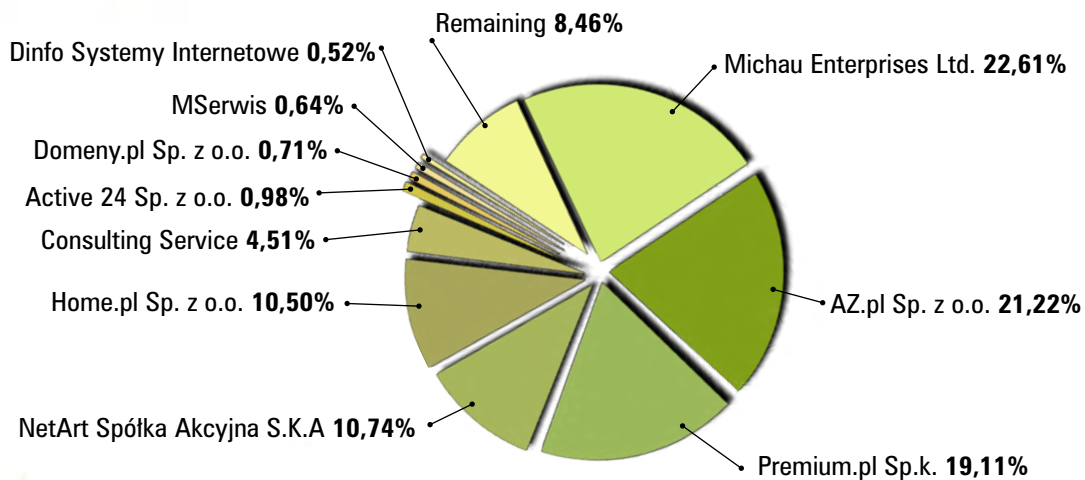
Home.pl Sp. z o.o. with share of active names at the level of **20,58%**, NetArt Spółka Akcyjna S.K.A. with **20,22%** share and AZ.pl Sp. z o.o. with **12,23%** share.

In the first quarter of 2012, Premium.pl Sp. k., with dynamics at the level of **12%** had the best dynamics of growth of serviced domain names and moved up by one place in the ranking. Another splendid result belonged to Michau Enterprises Ltd., in case of which dynamic of the growth was equal to **6,59%**. Third best result belonged to Consulting Service with growth at the level of **4,45%**.

By **8,8%** increased the number of domain names serviced by Partners outside of TOP 10.

Market share between Partners considering .pl IDN service

Market share between Partners considering .pl IDN service, Q1 2012*



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

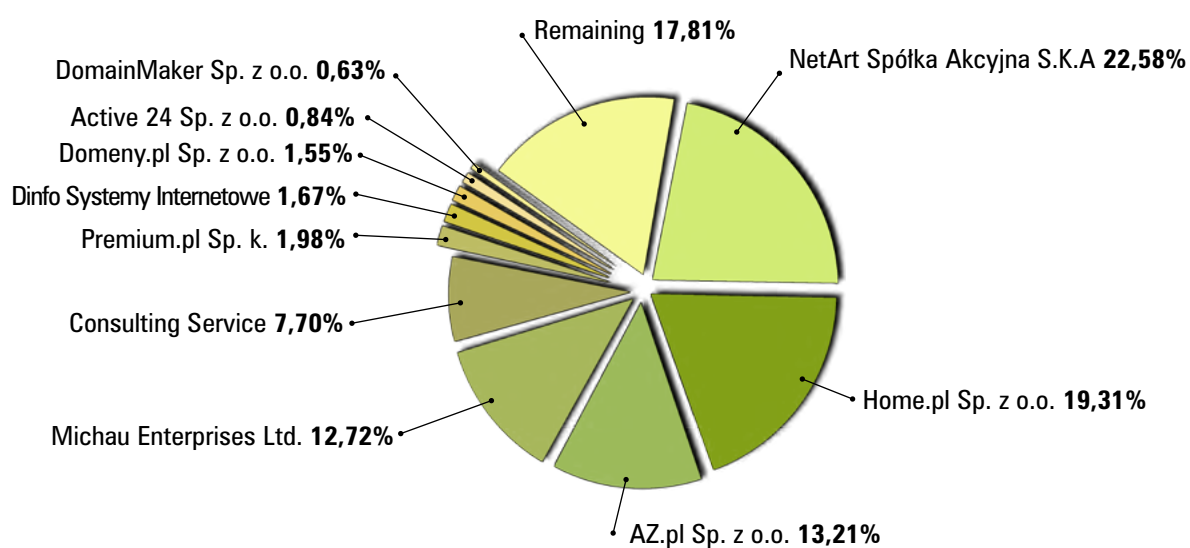
In the first quarter of 2012, a small decrease in the number of serviced Internatianolized Domain Names was noted. This decrease concerned names, serviced by six Partners from presented TOP 10. One Partner was able to maintain his number of serviced names from the end of 2011 and three Partners from presented TOP 10 noted increases.

Significant, **13%** increase was noted by Michau Enterprises Ltd. who simultaneously took leading position in the ranking. Following positions were occupied by Consulting Service and Home.pl Sp. z o.o., which achieved **6,63%** and **2,19% increase** respectively.

TOP 10 of the registrars, which service most names with national characters, opens with Michau Enterprises Ltd., which serviced **22,61%**, second place was taken by AZ.pl Sp. z o.o. which serviced **21,22%** and third place belonged to Premium.pl Sp. k. with **19,11%** serviced IDNs.

Market share between Partners considering new registrations

Market share between Partners considering new .pl domain name registrations, Q1 2012*



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

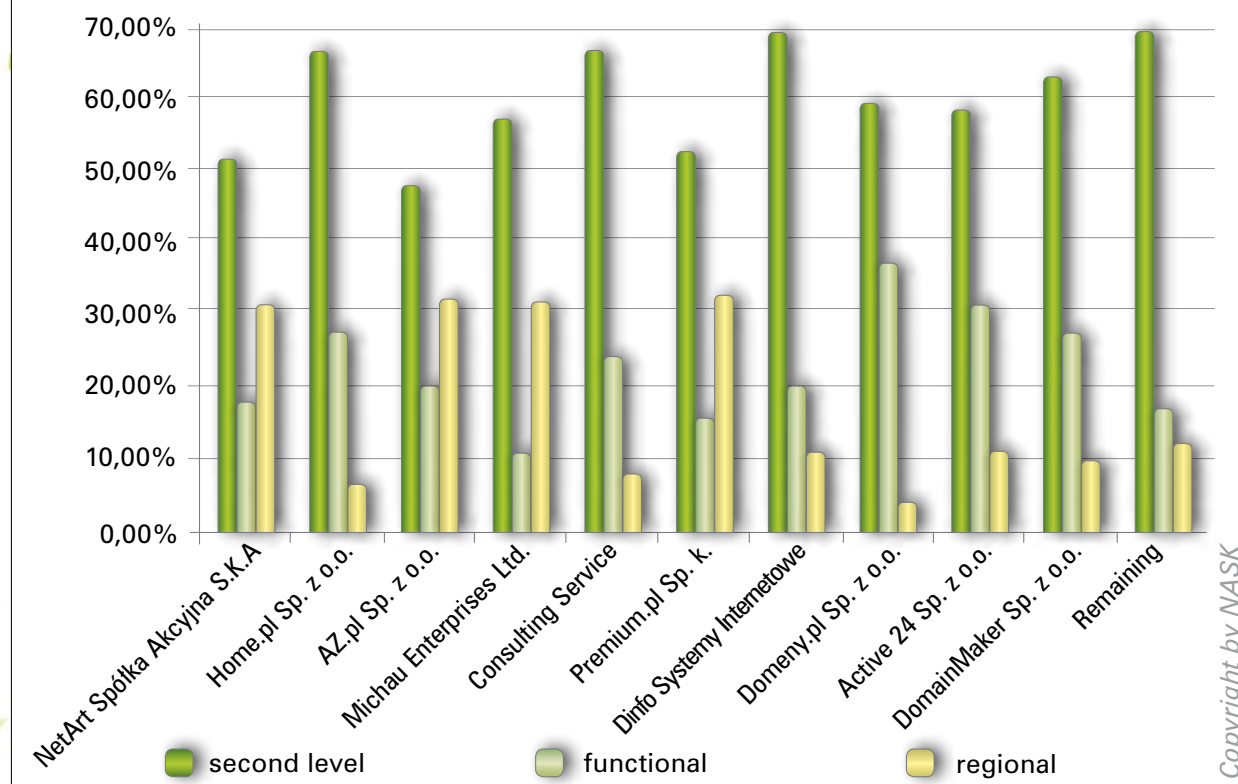
Since beginning of January until the end of March 2012, Partners from presented TOP 10 registered over **254,5 thousand** .pl domain names, which translates to **82,19%** of all registrations made at that time.

Beginning of 2012 is a period of reinforcing positions on the market by leaders. TOP 10 opened with NetArt Spółka Akcyjna S.K.A. with **22,58%** share, Home.pl Sp. z o.o. with **19,31%** share and AZ.pl Sp. z o.o. with **13,21%** share on the new registrations market.

Biggest increase in the new registrations market was achieved by Michau Enterprises Ltd. Share of the number of names registered through this Partner increased from **8,22%** in fourth quarter of 2011 to **12,72%** in first quarter of 2012.

Structure of domain names registered through Partners

Structure of names registered through Partners with the largest share in new registrations of .pl domain names, Q1 2012*

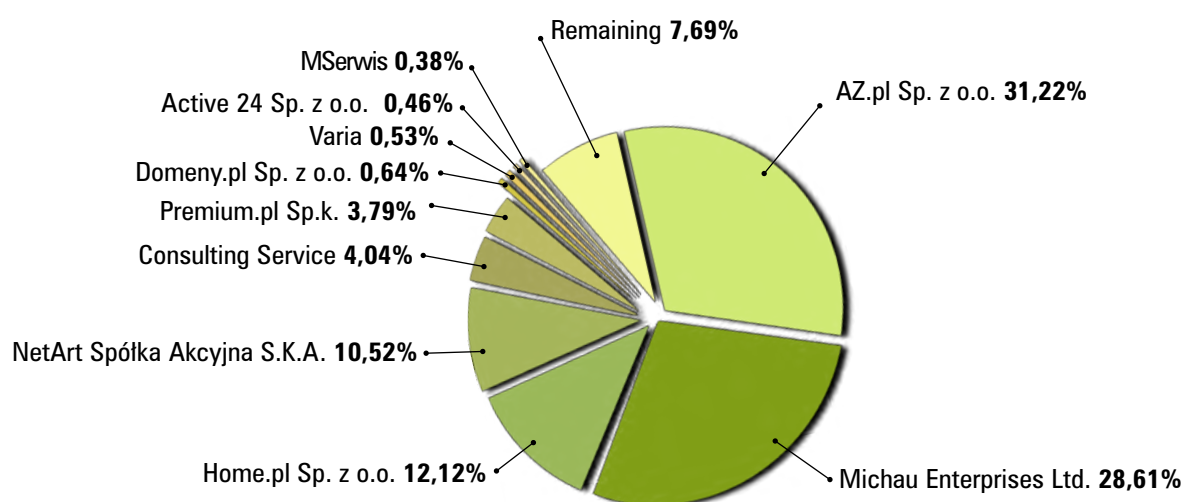


Analysis of extensions, in which registrations were made during the first quarter of 2012, had shown that Partners from TOP 10 mediate mainly in registration of names directly in .pl domain. In case of 9 Partners, these registrations constituted for over **50%** of all registrations.

Visible differences occurred in share of names registered in regional (.waw.pl, .wroclaw.pl, etc.) and functional (.com.pl, .net.pl, etc.) domains. In case of Partners like NetArt Spółka Akcyjna S.K.A., AZ.pl Sp. z o.o., Michau Enterprises Ltd. and Premium.pl Sp. k. second in popularity were registrations in regional domains, which constituted for over **30%** of all registrations. Registrants, which registered names through Partners like Home.pl Sp. z o.o., Consulting Service, Dinfo Systemy Internetowe, Domeny.pl Sp. z o.o., Active 24 Sp. z o.o. and DomainMaker Sp. z o.o. more often chose registrations of names in functional domains but only in case of Domeny.pl Sp. z o.o. and Active 24 Sp. z o.o. these constituted for more than **30%** of all registrations.

Market share between Partners considering .pl IDN registrations

Market share between Partners considering new .pl IDN registrations, Q1 2012*



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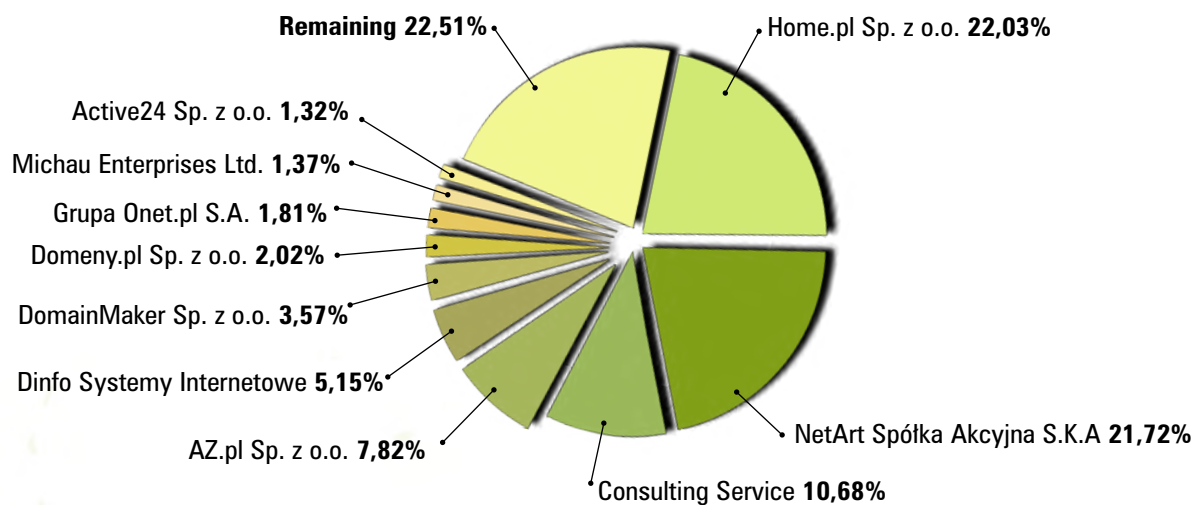
*The graph presents TOP 10 of NASK Partners that agreed to make their market share data public.

In the first quarter of 2012, **10 649** new names with national characters appeared in .pl domain name registry. This result is over **30%** better if compared to previous quarter.

Leading position in registration of names with national characters in .pl domain, in the first quarter of 2012, belonged to AZ.pl Sp. z o.o. , with **31,22%** share. Second place was occupied by Michau Enterprises Ltd, with **28,61%** share. Home.pl Sp. z o.o. closed the TOP 3 with **12,12%** share.

Market share between Partners considering Registrants

Market share between Partners considering .pl domain name Registrants, Q1 2012*



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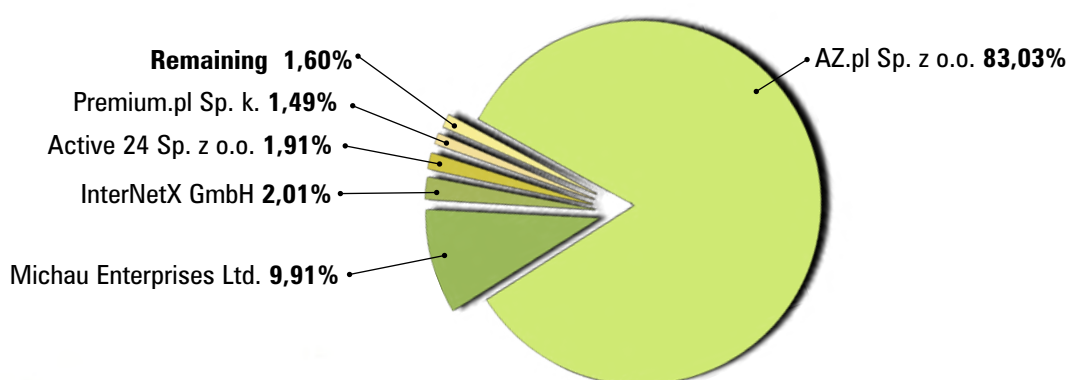
*The graph presents TOP 10 of NASK Partners that agreed to make their market share data public.

With the end of March 2012 almost **850 000** unique entries concerning .pl domain name Registrants were present. **65%** of entries concerned companies and organizations of different types, remaining **35%** concerned natural persons.

Almost **55%** of all Registrants were serviced by three Partners of NASK: Home.pl Sp. z o.o. - **22,03%**, NetArt Spółka Akcyjna S.K.A. – **21,72%** and Consulting Service **10,68%**.

Market share between Partners considering DNT registrations

DNT market share between Partners,
Q1 2012*



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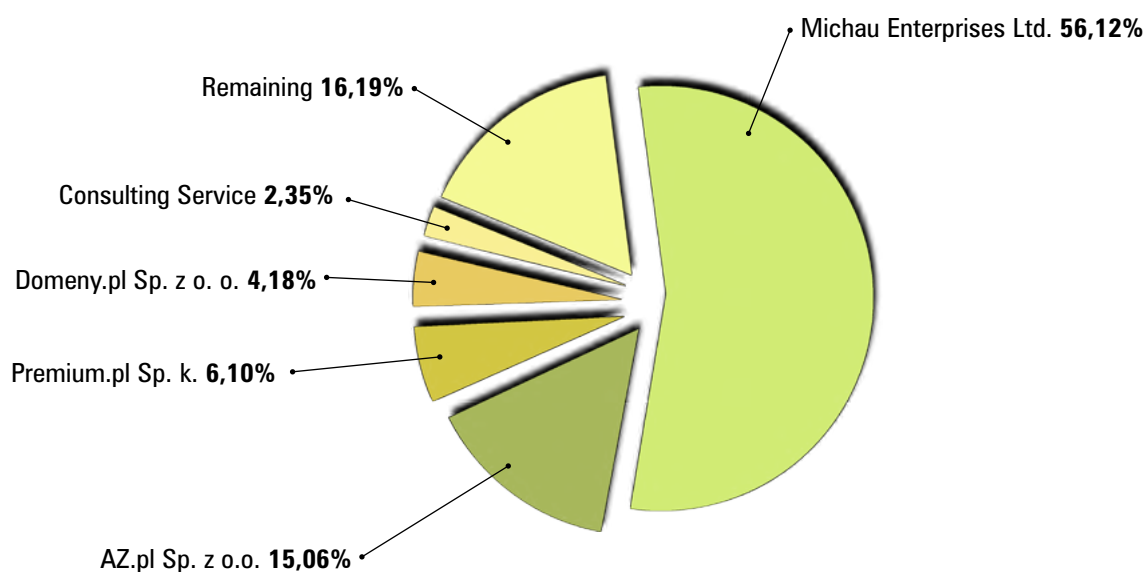
**The graph presents TOP 5 of NASK Partners that agreed to make their market share data public.*

In the ranking concerning number of registered DNT's, in the first three months of 2012, for the first time and immediately on the third position appeared our Partner from Germany – InterNetX GmbH, mediating in registration and service of **2,01%** of domain name tests.

For three quarters, DNT registration market was dominated by one Partner – AZ.pl Sp. z o.o. In the first quarter of 2012, AZ.pl Sp. z o.o. mediated in astonishing **83,08%** of all DNT purchases.

Market share between Partners considering WLS registrations

WLS market share between Partners,
Q1 2012*



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

In the first quarter **56,12%** of WLS services were bought through mediation of our Partner from Cyprus – Michau Enterprises Ltd. AZ.pl Sp. z o.o., second in ranking, mediated in **15,06%** of WLS purchases. Premium.pl Sp. k., third in ranking, mediated in **6,10%** of WLS purchases.

It is worthy to mention a significant, **7,65 p.p.** drop in WLS market share among Partners outside the presented TOP 5.

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