eco

WE'RE SHAPING THE INTERNET.

Registrar Atlas 2013

A look at the domain industry with a comparison of countries

Founding Partner

VERISIGN

Sponsoring Partner

DENIC afnic nic.at the austrian registry

Local Partner

SIDN уникнет.бг ISPA COORDINATION CENTER FOR TLD RU/РФ SWITCH

Contents

Preface	3
Management Summary	4
Methodical approach and issues investigated	6
A. Questions about the company	7
B. Questions about the domain name business	13
C. Questions about services/marketing	25
D. Questions about trends	33
Publication details	53

Preface

All good things come in threes!

eco presents here its third study of the domain industry, the Registrar Atlas 2013, and we already know this much: It won't be the last time!

Our thirst for knowledge is far from quenched, and the enormous positive feedback we have received confirms our belief that there are still many things to learn about the domain industry.

Let us recall: in 2011, we presented the first edition of the study, which examined the German market. We wanted to learn more about the companies that offer domain names. The response to the study was very positive and we were asked if we could compare the German market with other markets. In cooperation with ISPA Internet Service Providers Austria in Austria, SWITCH in Switzerland and SIDN in the Netherlands, we complied with this request in the second year and were already able to show a number of interesting differences between the different markets.

In this year's study, we went even further and asked companies in a total of eight markets to participate in the survey. This time Bulgaria, France, the United Kingdom and Russia were added.

Our objective is to further increase awareness of the study and motivate more company representatives to participate. Even though we do not have statistically relevant data for all questions from all countries, what we do have is more than we had before, and we can still derive valuable and interesting results from the responses. No doubt awareness of the study must be further increased in order to motivate more company representatives to participate.

Additional countries have already expressed their interest in participating in the future. Therefore, we will include even more markets in the study before long.

Not only the geographical factor is relevant, however – so is the time factor. The comparison between different countries is interesting, but how the domain industry evolves over time may perhaps be even more interesting. We are planning on providing you with exactly this information!

We hope to have piqued your interest in the Registrar Atlas again.

My thanks go to our local partners SWITCH, ISPA UK, Coordination Center for TLD RU, SIDN and UNINET.BG., Afnic, DENIC eG, nic.at and Verisign for their additional sponsorship.

I hope you find our study stimulating reading!

Harald Summa
Managing Director
eco – Association of the German Internet Industry

Thomas Rickert
eco Director of Names & Numbers
eco – Association of the German Internet Industry

Management Summary

eco – the Association of the German Internet Industry is presenting the Registrar Atlas for the third time. It examines eight markets: Bulgaria, Germany, France, the United Kingdom, the Netherlands, Austria, Switzerland and Russia. Nearly 300 representatives participated in the online survey, which supplied data material for the study.

We elicited information in four questionnaires about the companies, their domain name business, their service and marketing, as well as trends.

Common characteristics

- By far the majority of companies also deliver services other than domain name registrations, specifically hosting and email.
- In most companies the domain name business is handled by no more than three people. Only in Russia are domain names always handled by more people.
- Most of the companies have nationwide operations. Only in Austria is there plenty of regional business.
- In seven out of eight countries, at least 39% of the providers offer their customers a maximum of 25 TLDs.
- The companies are, for the most part, satisfied with the service of the "domain name suppliers", that is to say the wholesalers and registries.

Marketing

The companies are typically not very, to not at all, active in the marketing of domain names. The number of companies that do not market the domain names rose from 20% to 24% in Germany, and in Austria from 21% to 26%. On the other hand, in Germany the share of those companies that show high marketing activities climbed from 9% to 16%. However, the majority of the companies do not want to run special promotions for new gTLDs. Therefore, the new registries cannot really expect to receive additional sales support from the registrars.

New gTLDs

- Few providers will try to get accreditations for as many new TLDs as possible.
- Hardly any providers reject the new gTLDs categorically.
- Many providers want to offer new gTLDs only once they are generally available.
- Many providers are planning to offer new gTLDs only as resellers.
- An astonishingly large number of providers are planning further accreditations of existing TLDs.

New services

We once again asked the participants about the services their companies are already offering and those services they are planning to introduce over the course of the next twelve months. It again turned out that, with few exceptions, the plans were not carried out.
A positive example is the employment of tools which suggest similar domain names if the customer's desired domain name is not available. Here, the figure climbed from 24% to 33% in Austria. The plans were in fact implemented there.
On the other hand, the portfolio shrank for a few services. Take domain names in the secondary market in Austria for example. Here, the number of those providers who offer the pertinent services declined from 22% to 14%. A total of 67% of participants, compared to 45% last year, are not planning on including a service of this kind in their portfolio to begin with.

DNSSEC

Despite the hype about the security extensions for the DNS to prevent so-called DNS cache poisoning, significant use can only be detected in the Netherlands. There incentives were offered for employing DNSSEC, which led to relatively high demand last year. In all countries under investigation, demand is low again or non-existent. If the companies who stated they were already offering DNSSEC, or were going to

Management Summary

use it within the next year, had implemented their plans, we would have noticed a market penetration of 62% in Germany in the past year. In fact, it was 19% last year. If we add the 37% of companies that planned its introduction in the past year, 56% should now be actively using DNSSEC. The actual figure for this year, however, is only 18%.

Threats to the domain name sector

In the opinion of the domain name providers, the greatest threat to the domain name industry comes from the use of apps and search engines on mobile devices. In Austria the fear of search engines grew compared to last year. This was different in Germany, where the percentage of those who assume that there is a threat or great threat due to vanity URLS, declined from 37% to 21%.

Forecast

All in all, the providers are optimistic about the future, expecting business to grow. In Austria, the percentage of those who expect strong growth climbed from 2% to 10%. However, the general mood is more reserved than in previous years. In Germany, only 7% of companies expect strong growth, compared to 18% previously.

Methodical approach and issues investigated

The information on which this study is based was collected in the period between the beginning of November 2012 and the end of February 2013, via an online questionnaire, which was available at www.eco-umfrage/registraratlas.

In a data privacy statement, the participants were informed that they could participate without providing any personal data and that providing personal data was only required if the company wanted to participate in a draw, with the data in this case only being used for the purpose of sending the prize. The participants were also informed that the data would only be published cumulatively. Individual datasets, as well as the entire data materials, are not made available to third parties, including the sponsor.

The questionnaire consisted of four sections:

A. Questions about the company
B. Questions about the domain name business
C. Questions about services/marketing
D. Questions about trends

The questionnaire contained a total of 48 questions, many of which were based on the answers to the respective previous questions. As a consequence, not all questions were submitted to all participants for answering.

In Germany, participation in the survey was advertised via various newsletters, announcements in social networks, at events, in a podcast, and by addressing a large number of market players directly. In Austria, Switzerland, the Netherlands, France, the United Kingdom, Bulgaria and Russia, the survey was advertised and coordinated by the local partners nic.at, SWITCH, SIDN, Afnic, ISPA UK, UNINET.BG. and Coordination Center for TLD RU. As in Germany, partially matching measures were employed.

The results from the total number of 298 participants were considered for the evaluation.

The number of responses varies substantially from question to question and from country to country. As a consequence, the findings are not always statistically relevant. Nonetheless, all answers have been incorporated in the graphs for the reader's information. Additionally, the sum of all answers in all countries has been added to make it easier for the reader to assess the overall responses for all countries. It should also be noted that the difference in the number of respondents and answers also stems from the fact that the various markets differ substantially. For example, in Russia, there are only 26 accredited registrars, while there are a total of 1650 registrars including their resellers in The Netherlands. Both in The Netherlands and in France, there is a total of 7.1 million domain registrations, but in in France, there are far less registrars (490 Afnic-accredited registrars).

A. Questions about the company

The first of the four sets of questions starts with considering where the respective companies operate. The participants could choose among three options for answering the question. They were asked to state whether their company only operated in the respective domestic market, also operated abroad or if it was a foreign company that also operated in the respective domestic market. Even though the number of participants who answered this question does not provide statistical relevance for all markets, it is nonetheless worthy of note that in all countries, with the exception of Bulgaria, the largest number of companies consist of domestic companies that also operate abroad. At 67%, Bulgaria and Russia have the largest percentage of companies that operate in the domestic market only. It is also conspicuous that companies in Germany were the only survey participants whose seat of business is abroad but that also do business in Germany. Even though we can state with near absolute certainty that all other countries also have companies that offer their services there but have their seat of business elsewhere, Germany still seems to be a particularly attractive market for foreign providers. This is also reflected, for instance, in the fact that the German country extension ".de" is the most successful country code top-level domain in the world. At 10%, the share of foreign companies operating in Germany has remained at the same level as in the previous year, while in 2011 this figure was only 6%. The share of companies that only operate in the German market was 33%, the same as in the previous year. As noted above, at 57%, most of the companies are domestic enterprises also doing business abroad. In the previous year this figure was also 57%, and in 2011 it was 61%.

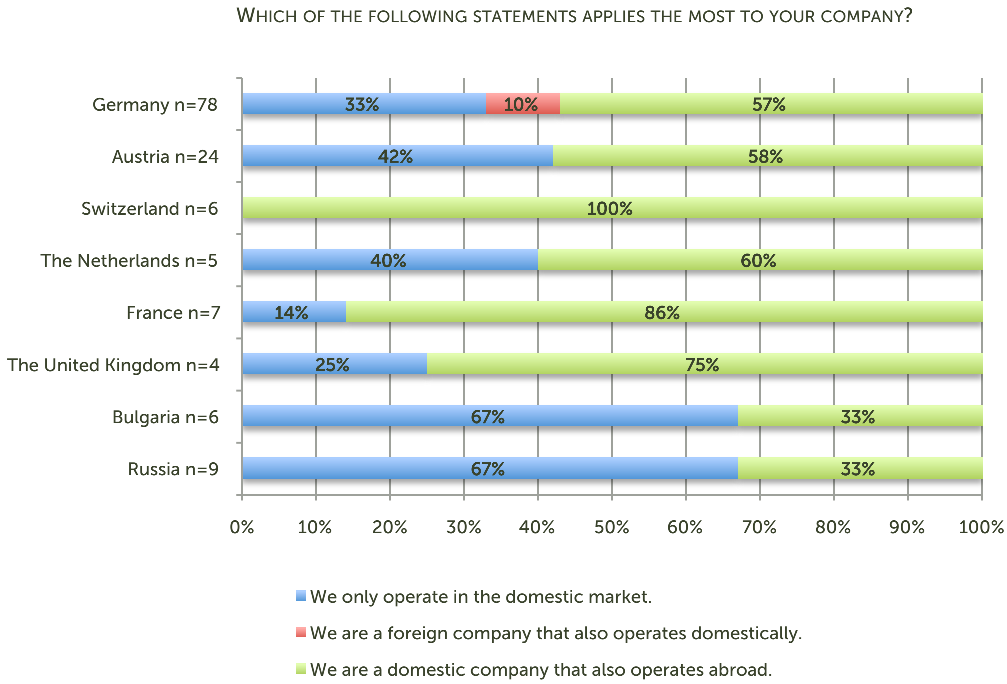


Fig. 1 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The diagram below shows how many employees deal with the domain name business exclusively at the participating companies. Most companies offer additional services, meaning the total number of employees does not permit any inference on the staffing level in the domain name department. As in the past years, it turns out that in most companies only one to three persons deal with this business segment.

The following two diagrams for Germany and Austria show the correlation between the number of staff members in the domain name business and the total number of employees.

HOW MANY FULL-TIME EQUIVALENTS ARE ALLOCATED TO THE DOMAIN NAME BUSINESS?

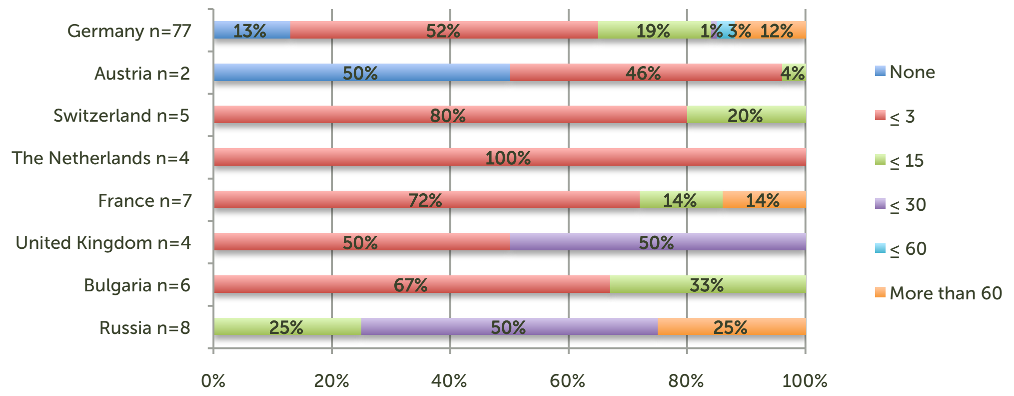


Fig. 2 | eco – Association of the German Internet Industry, Registrar Atlas 2013

TOTAL NUMBER OF COMPANY EMPLOYEES IN RELATION TO THE FULL-TIME EMPLOYEES IN THE DOMAIN NAME BUSINESS

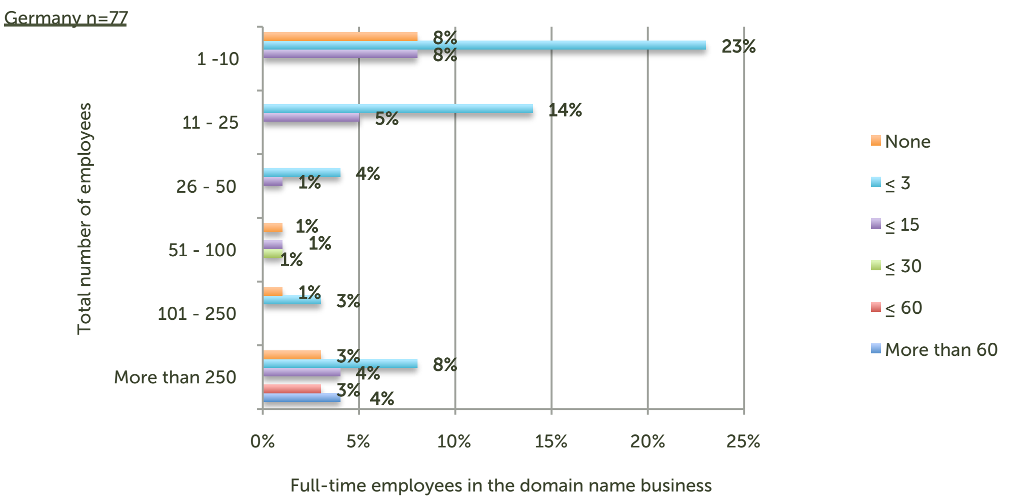


Fig. 3 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Total number of company employees in relation to the full-time employees in the domain name business

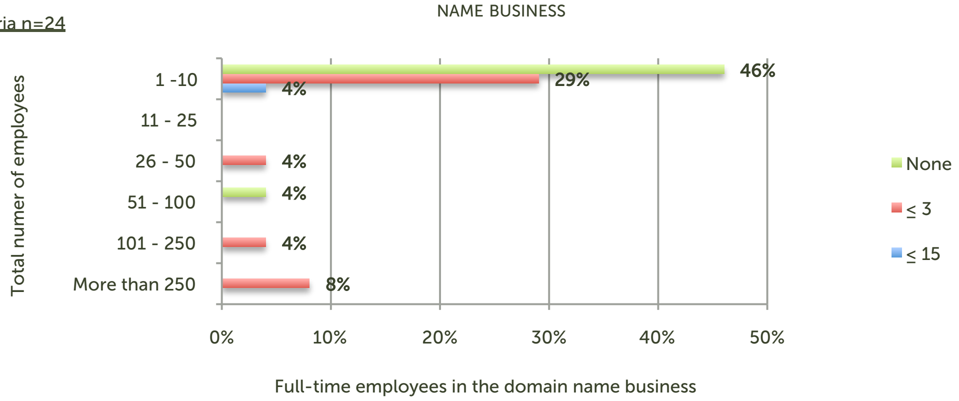


Fig. 4 | eco – Association of the German Internet Industry, Registrar Atlas 2013

This year, we once again asked the survey participants whether they know where most of their customers are domiciled. In the past year, it turned out that in Germany, Austria and the Netherlands 56%, 55% and 59% of the providers, respectively, do business on a national level. There was hardly any local business, though. The latter result was repeated in this year's survey. Even though 14% and 22% of the survey participants in Bulgaria and Russia, respectively, stated that they were engaging in local business, this result must be qualified with respect to the small number of participants. However, what is noticeable in last year's as well as this year's result is that in no other country do as many participants state that they serve a regional market as in Austria. The share of these respondents climbed from 26% to 58% at the expense of those companies that serve customers throughout Austria. The number of these companies declined from 55% to 4%.

Where do your customers predominantly reside?

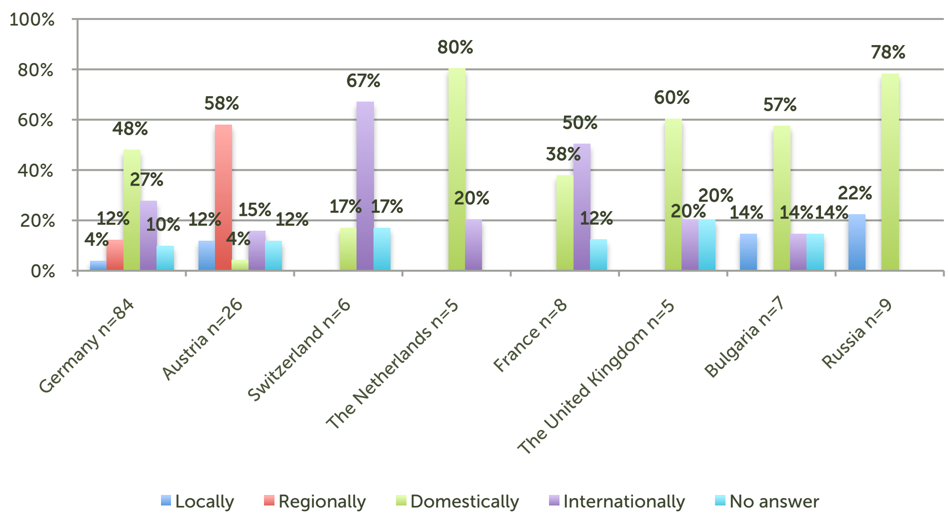


Fig. 5 | eco – Association of the German Internet Industry, Registrar Atlas 2013

In the second question, we asked the participants to state on which continents or in which countries most of their customers are domiciled. Here multiple answers were allowed. The country with the smallest geographical distribution was the Netherlands, with all of the providers stating Europe as the region where most of their customers are located. The result was similar in 2012. In the previous survey, all participants in the Netherlands had also stated that the majority of their customers were domiciled in Europe. The greatest diversity of the "markets catered to" can be found in France and Germany. In Bulgaria, only Russia is named aside from Europe. Further on in our analysis we will see that Bulgaria has a substantial share of providers with IDN support. No doubt the geographical distribution of the customers also has linguistic reasons.

ON WHICH CONTINENTS / IN WHICH COUNTRIES ARE MOST OF YOUR CUSTOMERS?
MULTIPLE ANSWERS POSSIBLE

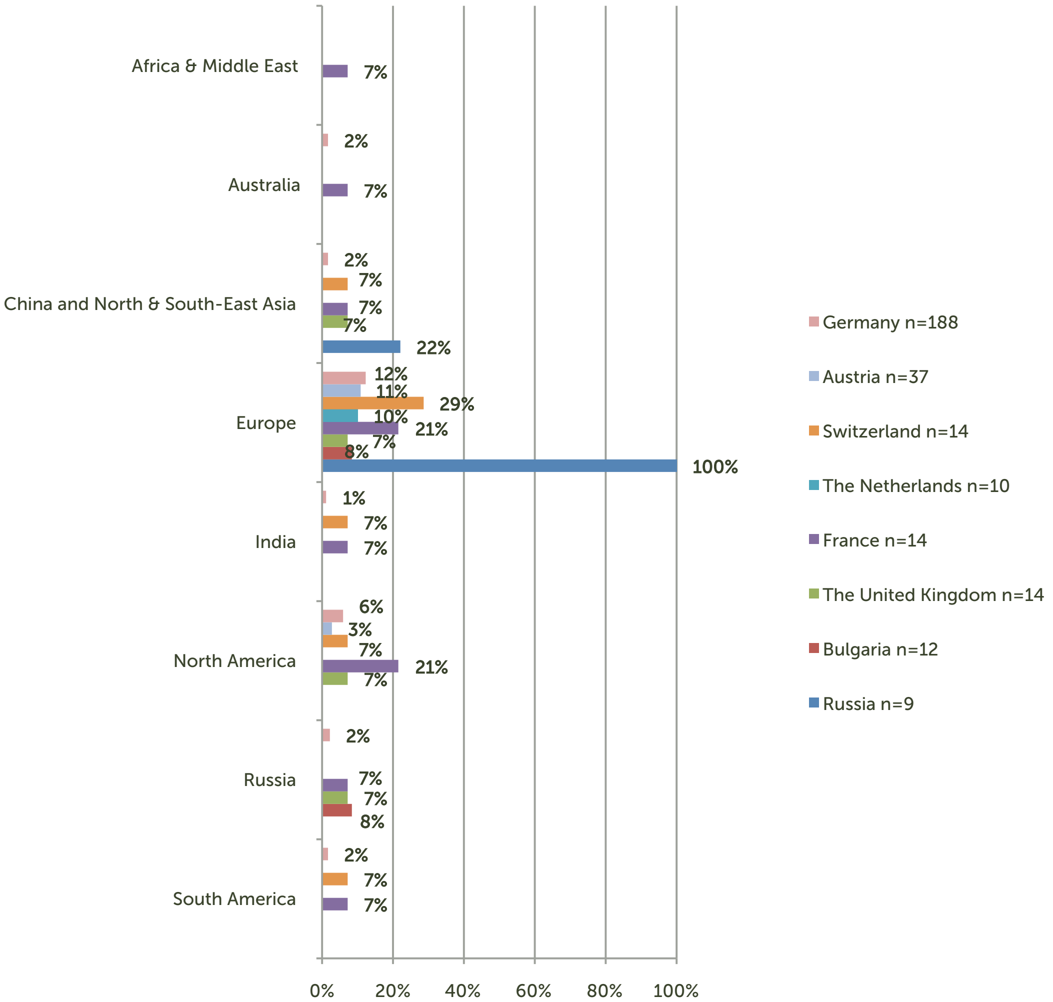


Fig. 6 | eco – Association of the German Internet Industry, Registrar Atlas 2013

We furthermore asked where in Europe the customers of the surveyed providers can be found. The answer options were southern, northern, eastern, central and western Europe; multiple answers were possible. It turned out that the providers from Germany, Austria, Switzerland as well as France cover the entire market. The Dutch participants ticked only western and southern Europe. The greatest concentration in a specific region can be found in the United Kingdom and Bulgaria. There, only western and eastern Europe were named as regions in Europe in which the companies do business.

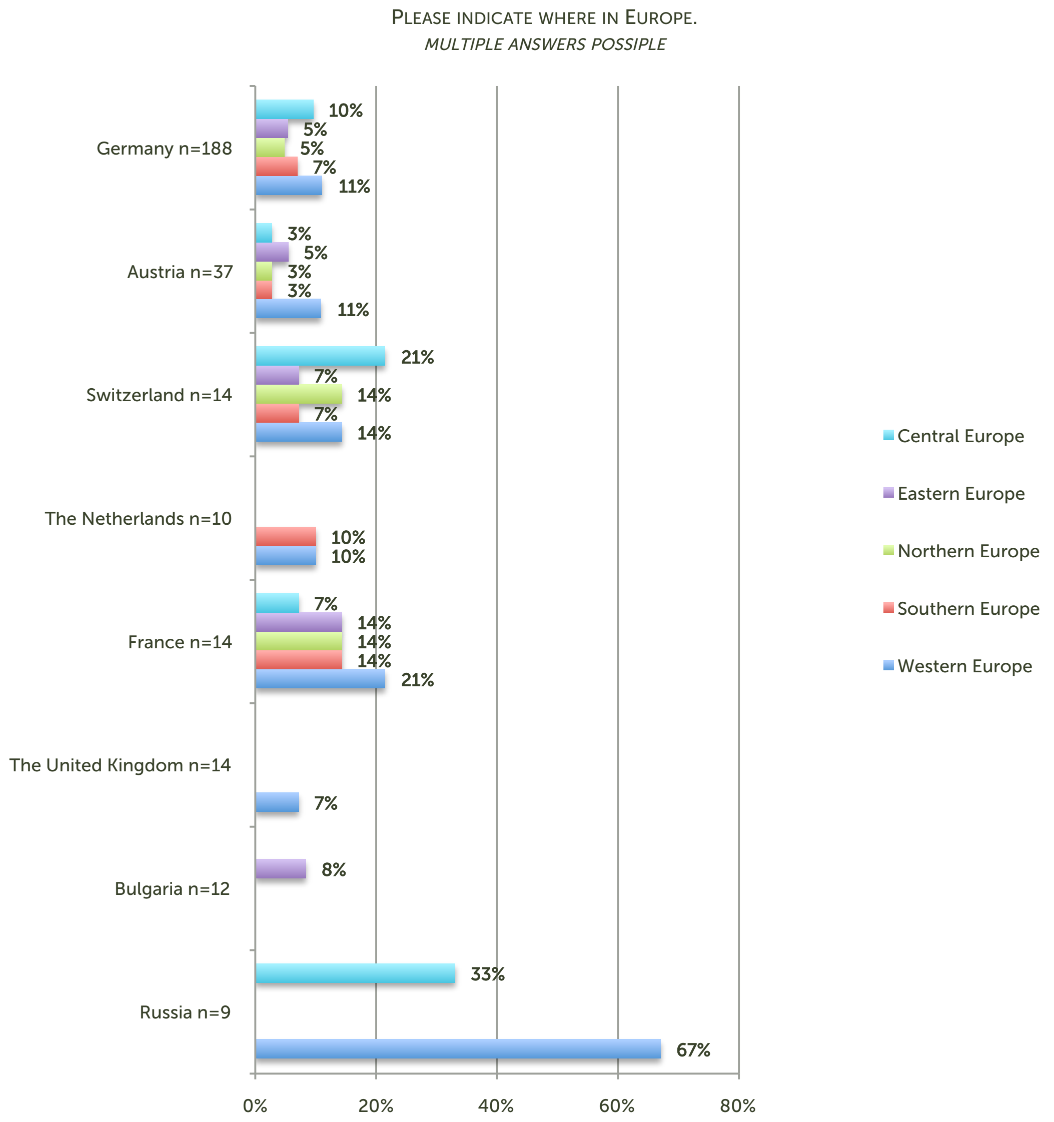


Fig. 7 | eco – Association of the German Internet Industry, Registrar Atlas 2013

With the following questions, we solicited information about the composition of the clientele of the companies, broken down into private customers, SMEs and large corporations.

HOW WOULD YOU CLASSIFY YOUR CUSTOMERS BY PERCENTAGE?

Private person

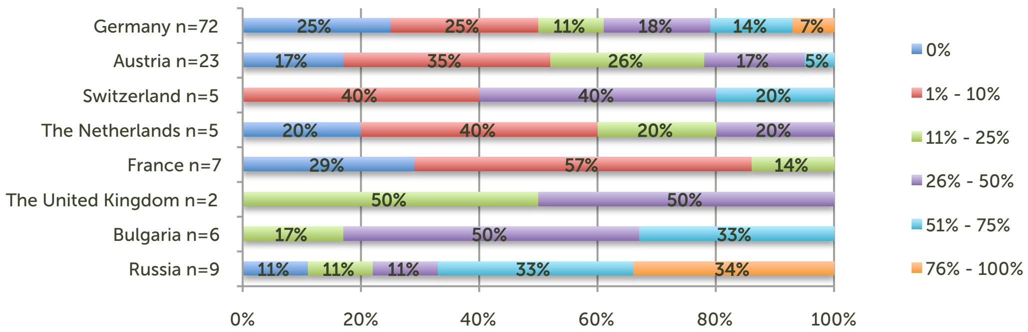


Fig. 8 | eco – Association of the German Internet Industry, Registrar Atlas 2013

SMEs

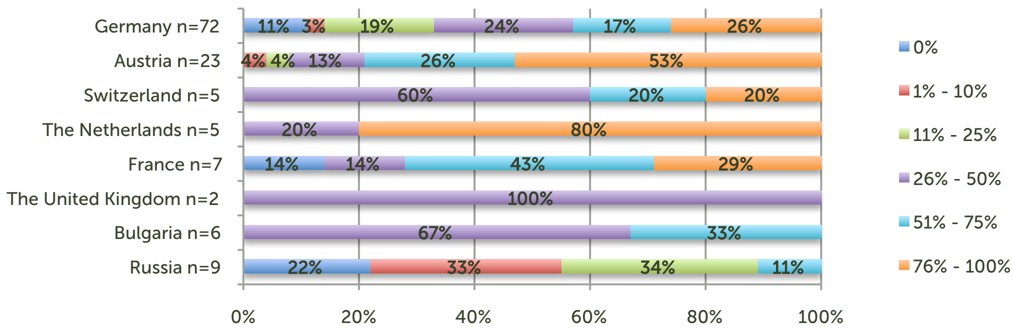


Fig. 9 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Large corporations

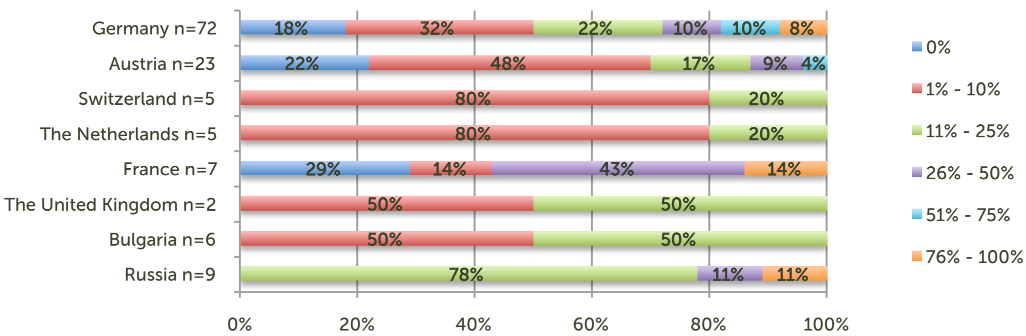


Fig. 10 | eco – Association of the German Internet Industry, Registrar Atlas 2013

B. Questions about the domain name business

We also asked the participants in which business sectors the companies they serve do business. It turned out that a particularly large number operate in the fields of email and hosting. Yet the diagram also shows that the companies are offering a wide range of additional services.

IN WHICH SECTORS DO YOU DO BUSINESS AS WELL?
MULTIPLE ANSWERS POSSIBLE

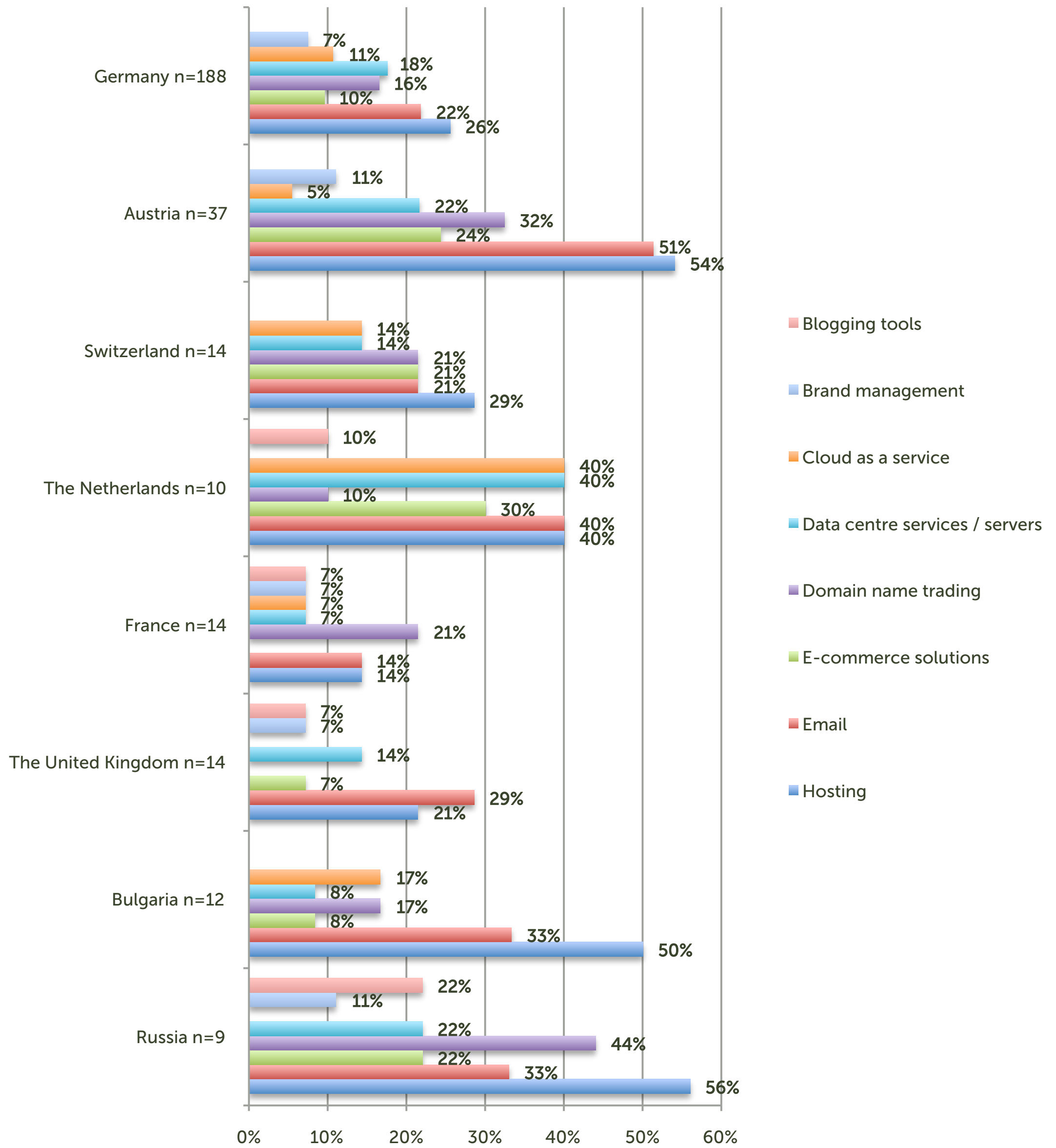


Fig. 11 | eco – Association of the German Internet Industry, Registrar Atlas 2013

IN WHICH SECTORS DO YOU DO BUSINESS AS WELL?
MULTIPLE ANSWERS POSSIBLE

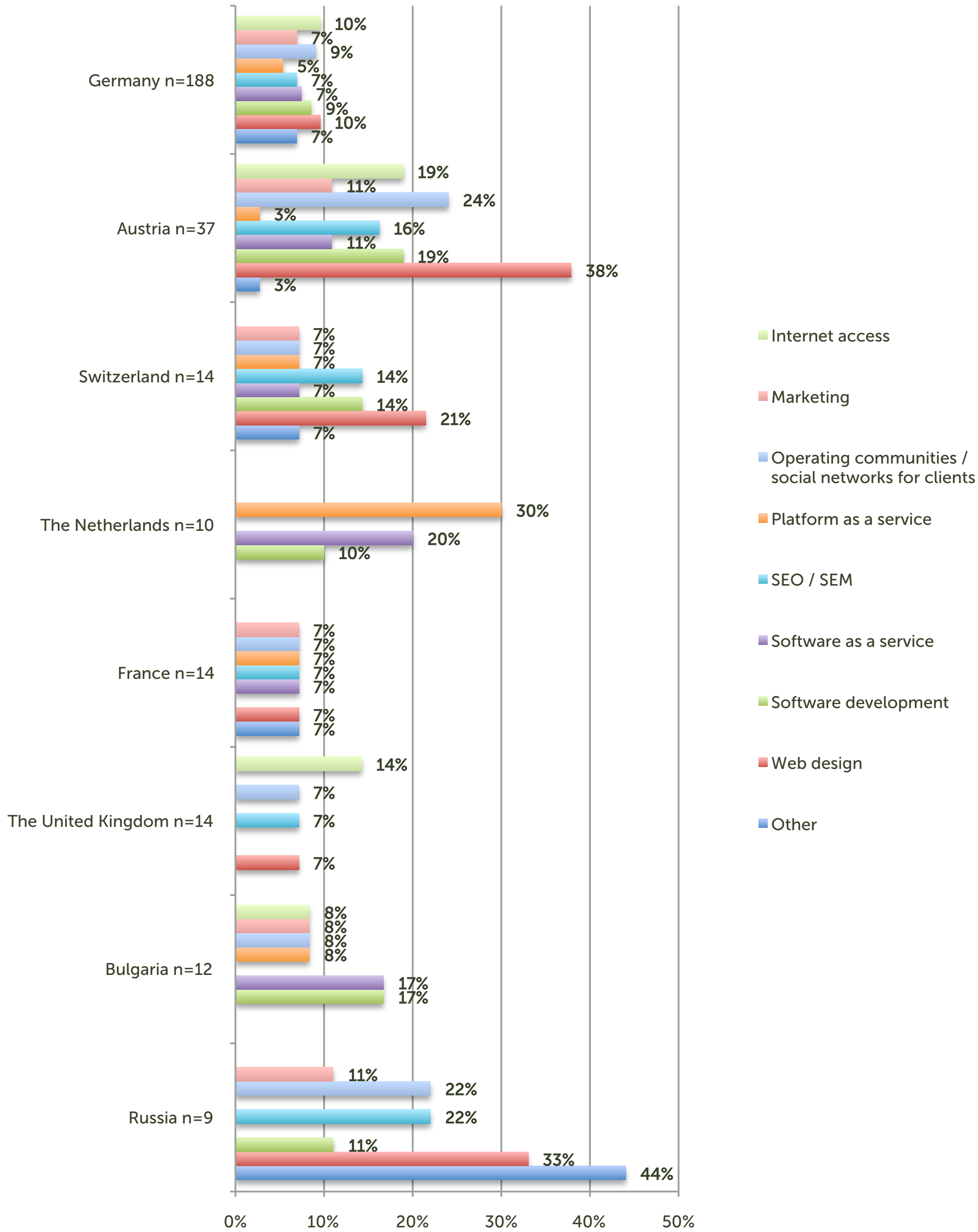


Fig. 12 | eco – Association of the German Internet Industry, Registrar Atlas 2013

It follows that our survey reached more companies than those that only operate exclusively in the domain name business. This was in fact the explicit objective of the undertaking. We were particularly interested in talking to companies that offer their customers domain name registrations as one of their services. Despite the wide range of specific products the individual companies may have, however, it became clear that the domain name business seems to be rather important for most of them. Only occasionally did a company respond to the question about the importance of the domain name business for them by saying that it was not important. By contrast, many companies stated that they consider the domain name business to be important and even very important for their company.

HOW IMPORTANT IS THE DOMAIN NAME BUSINESS FOR YOUR COMPANY?

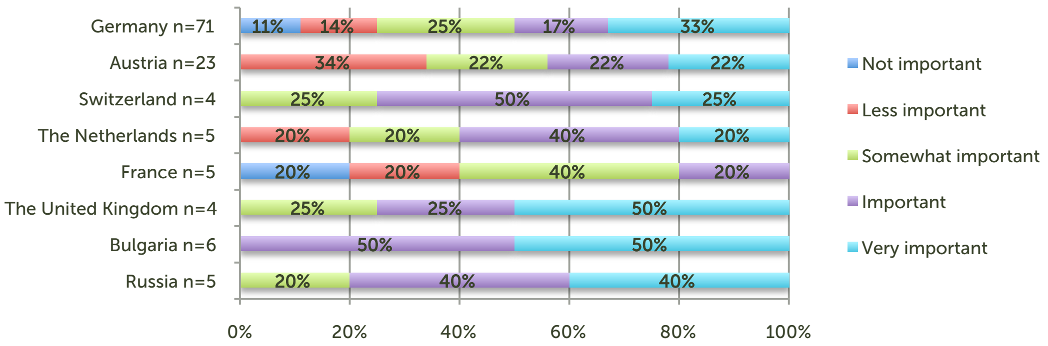


Fig. 13 | eco – Association of the German Internet Industry, Registrar Atlas 2013

If we consider these responses in the context of the answers to the question of what proportion domain name business contributes to the total revenue of the company, it turns out that most of the companies generate only up to 10% of their earnings with domain name registrations.

The main reason why the domain name business is attractive to companies is because domain name registrations translate into recurring sales and, in most instances, involve little effort and expense.

WHAT SHARE OF YOUR REVENUES CAN BE ATTRIBUTED TO YOUR DOMAIN-NAME-BUSINESS-RELATED SERVICES?

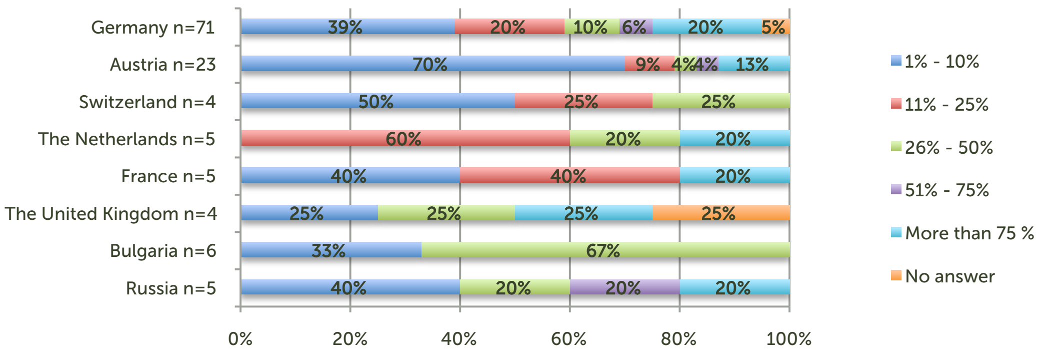


Fig. 14 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The next diagram shows how many domains the participating companies administer for their customers. In Austria, the percentage of companies managing between 101 and 1,000 domain names is conspicuously high. This corresponds to the large share of regional business in Austria and corroborates the assumption that the companies offer their customers various services, including domain names, as "local" contacts.

HOW MANY DOMAIN NAMES DOES YOUR COMPANY ADMINISTER?

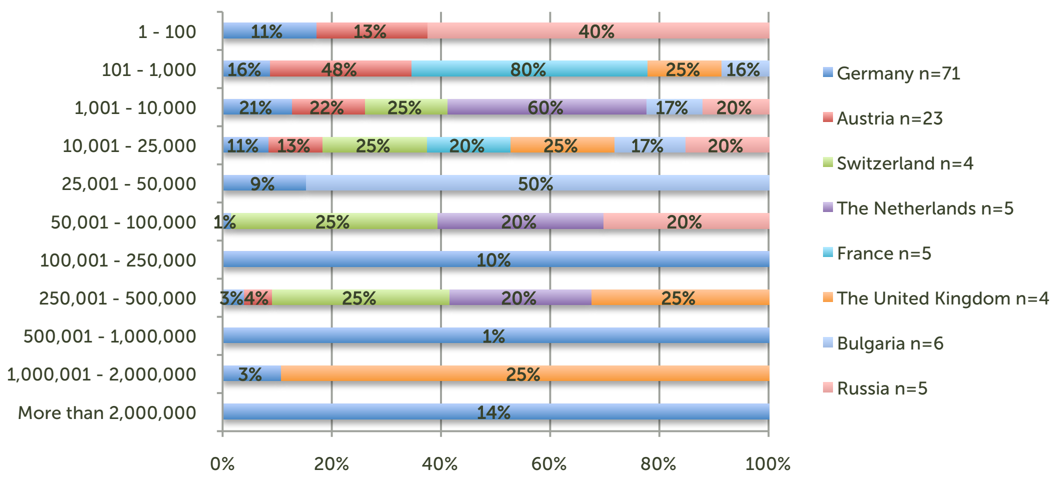


Fig. 15 | eco – Association of the German Internet Industry, Registrar Atlas 2013

When looking at the answers to the question of how many business customers the providers handle directly as owners of domain names (rather than as resellers), it is most obvious that we were able to reach companies of all sizes, from companies with 1 to 100 customers to companies serving more than one million business customers – with the number of companies with an extremely large share of business customers being very small, of course. In Austria, the number of companies serving not more than 1,000 business customers was conspicuously large. They amounted to altogether 81%, of whom 19% stated that they had 1 to 100 customers and 62% that they had 101 to 1,000 customers. This might have something to do with the largely regional business of the Austrian providers. An explanation for this result could be that regional ISPs or regionally acting agencies offer their customers domain names and that it is the company structure or its portfolio that determines its regional character. This assumption is corroborated by the answer to the next question, concerning the number of private customers served by the companies directly as owners of domain names. In Austria, the percentage of companies that serve a maximum of 1,000 private customers is also slightly less than 80%. In Germany, we were able to reach companies of all sizes, with small providers handling up to 100 private customers and companies handling up to 10,000 customers constituting the majority at 24% and 20%, respectively.

How many business customers (registrants) does your company handle directly?

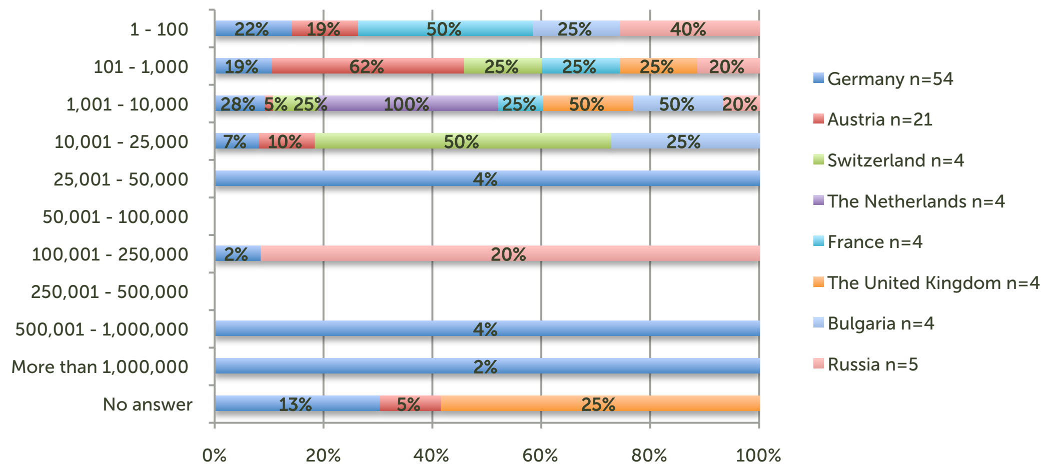


Fig. 16 | eco – Association of the German Internet Industry, Registrar Atlas 2013

How many private customers (registrants) does your company handle directly?

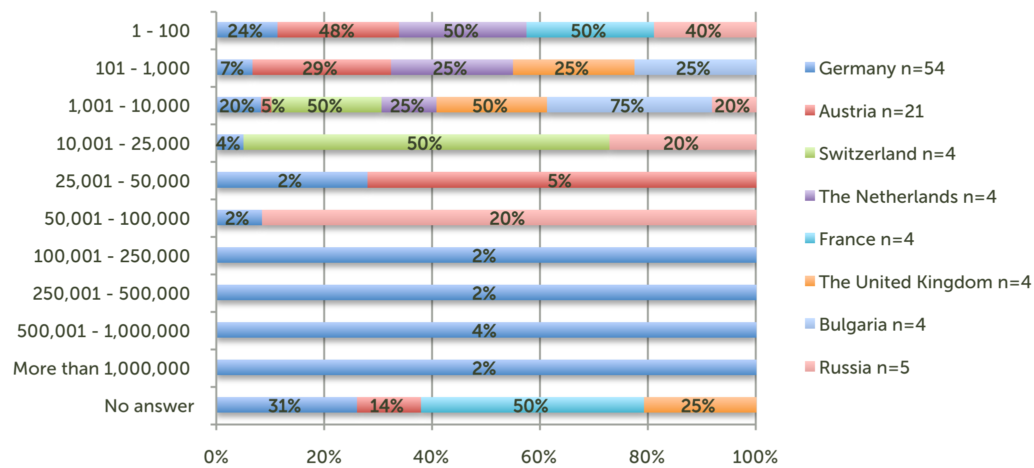


Fig. 17 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Furthermore, we asked the participants how many top-level domain names they were offering their customers. We now have comparative figures for three years for Germany. After 26% in the two previous years, the share of companies offering their customers more than 250 extensions is nearly at the same level this year at 24%. No less than 16% of the companies offer their customers more than 100 TLDs. This figure climbed slightly from 11% in the previous year to 16%. The number of companies that offer their customers more than 50 up to 100 extensions is now approaching zero. It declined from 11% to 3%. In the category from 26 to 50, the figure climbed from 11% in the previous year to 17% this year. At 13% compared to 15% last year, the number of companies offering their customers 11 to 25 extensions remained nearly the same. Unfortunately, the number of companies offering their customers only up to ten TDLs also increased by 5% to 27%. However, this might be also due to the fact that we reached different respondents this year. It remains to be seen over time whether the current snapshot is representative for a development in the market.

HOW MANY DIFFERENT DOMAIN NAME SUFFIXES (TOP-LEVEL-DOMAINS SUCH AS .COM, .DE, .AT, .CH, .NL, .FR, .UK, .RU AND .BG) DO YOU OFFER YOUR CUSTOMERS?

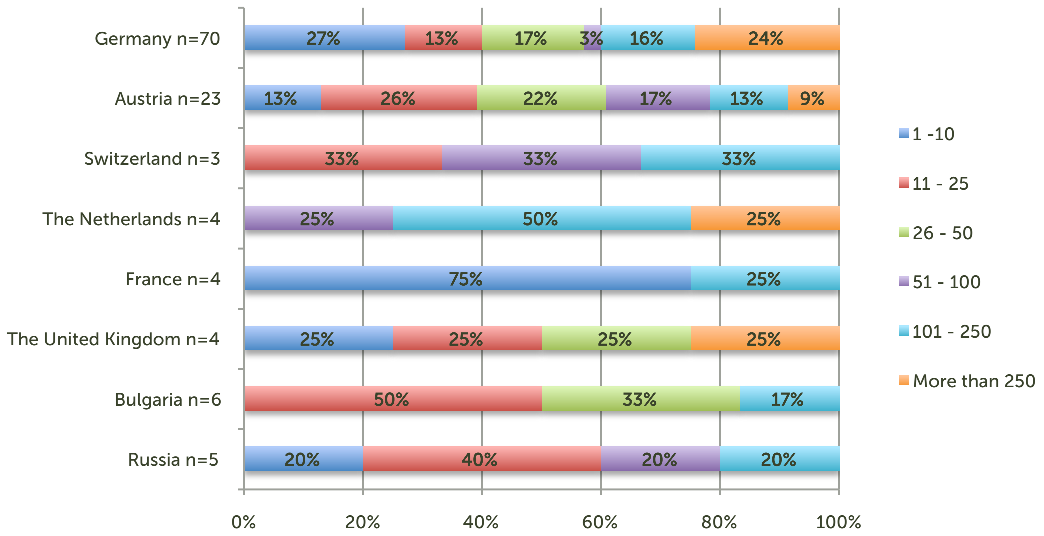


Fig. 18| eco – Association of the German Internet Industry, Registrar Atlas 2013

Last year, we had believed we had reason to note a promising trend in this respect, after the percentage of companies with the most limited product range had dropped from 28% to 22%. The fact that in France, the United Kingdom and Russia a relatively large share of companies were offering the smallest selection of domain names is probably due not only to the number of participants in the study (which can certainly be improved upon) but also to Switzerland and Bulgaria having no providers that offer their customers fewer than eleven TLDs, and in the Netherlands even more than 51 TLDs. Despite the small number of participants, it is gratifying to note that in Switzerland, the Netherlands, France, the United Kingdom, Bulgaria and Russia, providers at the top end of the spectrum with 100 or more TLDs could be reached. Russia moreover shows a fairly balanced picture across all categories. This demonstrates that despite the very small number of domain name providers in Russia, the specific make-up of the market participant's product portfolio is very different from that of others. In conclusion, we would like to mention the distribution in Austria, which is also very balanced. With respect to the above comments concerning the relatively large share of regional business, this demonstrates that focusing on the regional market can by no means be attributed to a specific diversity in the domain name portfolio (or a lack of offers). Rather, the regional providers must also belong to the categories of those companies that offer their customers a large variety of domain name extensions.

In this year's study, our question of how many accreditations the companies had revealed that apparently hardly any respondents have more than 50 accreditations. The major share of respondents stated that they had only one to ten accreditations. The answers to this question are not a reflection of the actual offer for the customers of the respective providers. In by far the most cases, the offers are complemented by additional extensions on the basis of their accreditations. It remains to be seen if the number of a company's accreditations is subject to substantial changes in the course of the introduction of new TLDs. Ultimately, however, the number of accreditations which companies have is probably not particularly important in the entire sector. What are likely to be more important are the changes which the offer for the customers undergoes. This will be the only criterion that indicates whether the potential registrants actually benefit from the expansion of the range of names or whether they can notice it at all to begin with.

How many domain accreditations does your company hold (for example, member of DENIC eG for ".de", accreditation by ICANN for ".com" or by EURid for ".eu")?

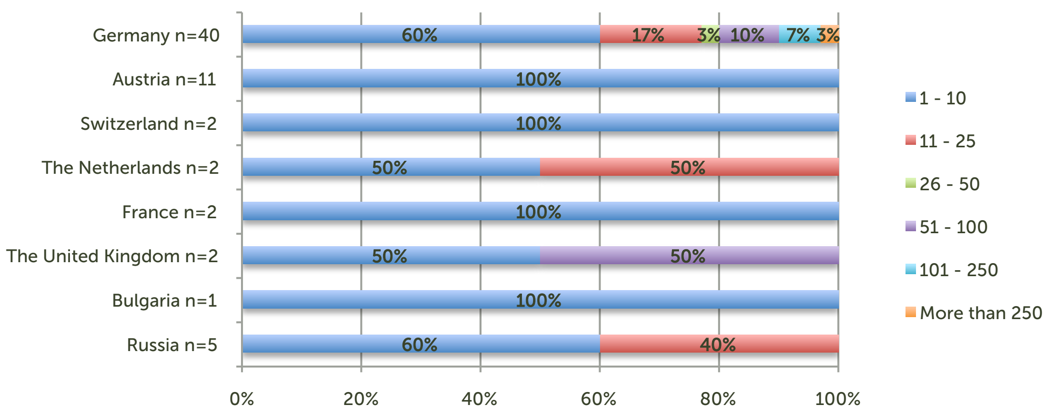


Fig. 19 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Cumulative result of all countries

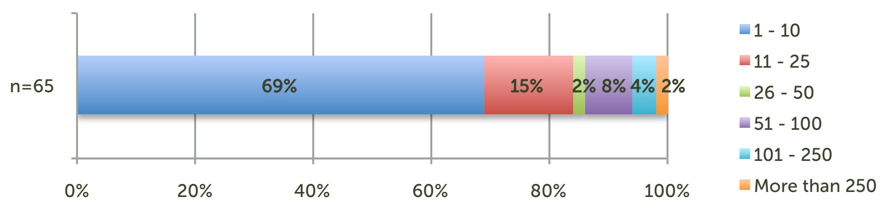


Fig. 20 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The following diagrams illustrate the ten TLDs most registered by the participants in Germany and Austria – always in comparison with the data collected in the previous year. It turns out that the ranking has remained largely stable. In Germany, ".nl" joined the top ten, at the expense of ".uk".

Which 10 top-level domains do you sell the most?

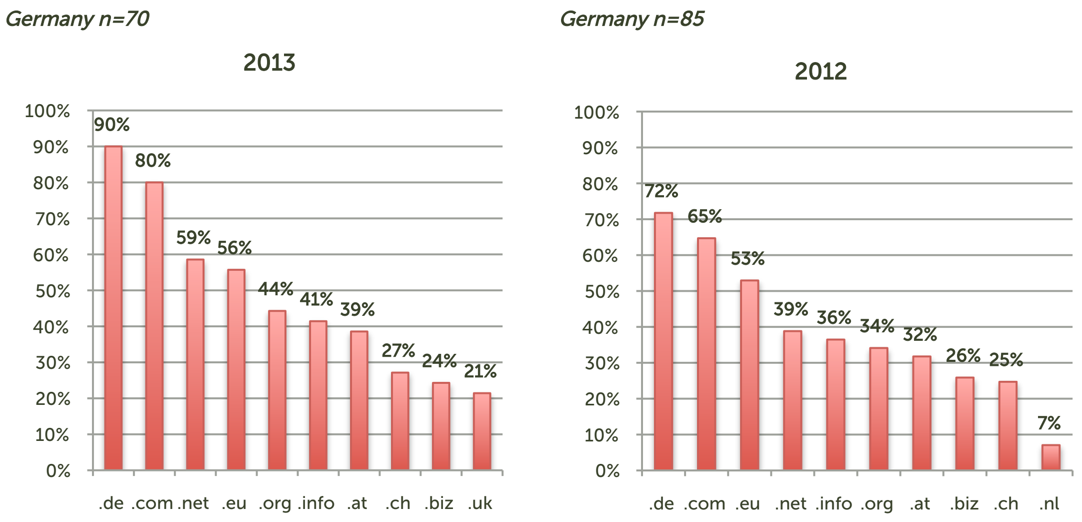


Fig. 21 | eco – Association of the German Internet Industry, Registrar Atlas 2013

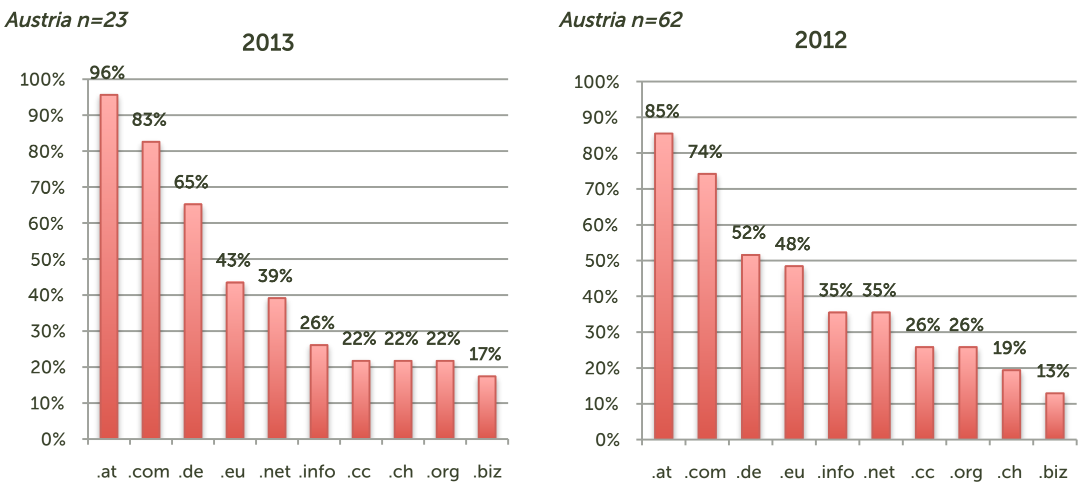


Fig. 22 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The question concerning the number of providers "supplying" the companies is probably going to be thrilling in the years to come if changes occur in this respect. In Germany, the number of companies that obtain domain names from three to five companies increased from 29% to 42%.

Otherwise the picture we get is diffuse. It remains to be seen if companies take the introduction of new gTLDs as an opportunity to consolidate their relationships with their suppliers and decide to get everything from one source.

From how many accredited registrars or their resellers do you purchase?

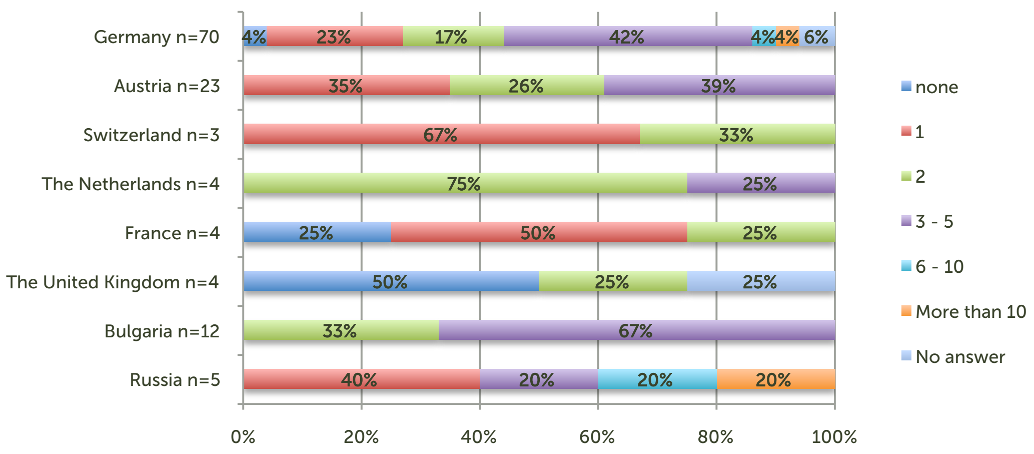


Fig. 23 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Cumulative result of all countries

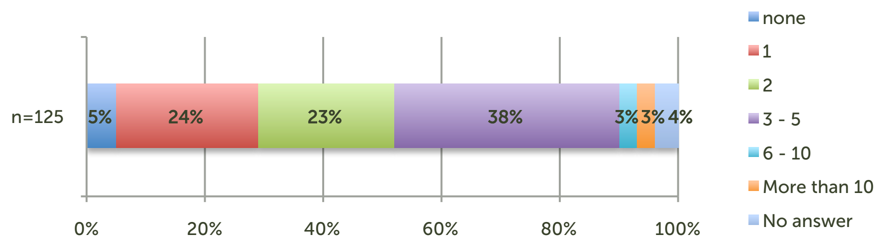


Fig. 24 | eco – Association of the German Internet Industry, Registrar Atlas 2013

For the first time, we asked for the renewal rate among the participating providers in our survey, that is to say, for the percentage of the domain name registrations which are renewed after the end of the respective contract term (which is typically one year).

Customers have a number of different reasons for not renewing their domain name registrations. These include that a company wants to consolidate its stock of domain names, delete a domain name for lack of relevance or use specific domain names, a change in providers or insufficient revenue from domain names – on the part of the domain name seller or those monetising the domain names – so that the expense for registration fees is not justified. The data collected here constitutes an important basis for comparisons with future surveys, because we will then find out whether the new TLDs serve as objects of speculation or generate permanent registrations.

WHAT IS THE AVERAGE RENEWAL RATE OF THE REGISTRATIONS YOU HANDLE?

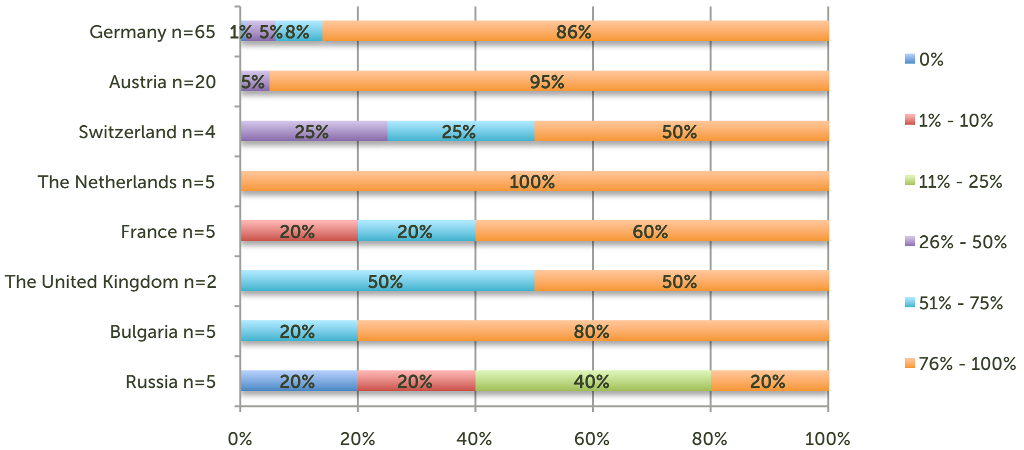


Fig. 25 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Furthermore, we wanted to know the percentage of the domain names using DNSSEC. The answers in all markets examined quite clearly show that the share of domain names using the DNS security extensions using the so-called DNS cache poisoning is only 0% to 2%. Only in France and Germany did the respondents state that the number of domain names employing DNSSEC was between 2.1% and 5%. What stands out particularly is a response from the Netherlands, where a provider stated that more than 25% of companies were using DNSSEC.

WHAT IS THE PERCENTAGE OF DOMAIN NAMES USING DNSSEC?

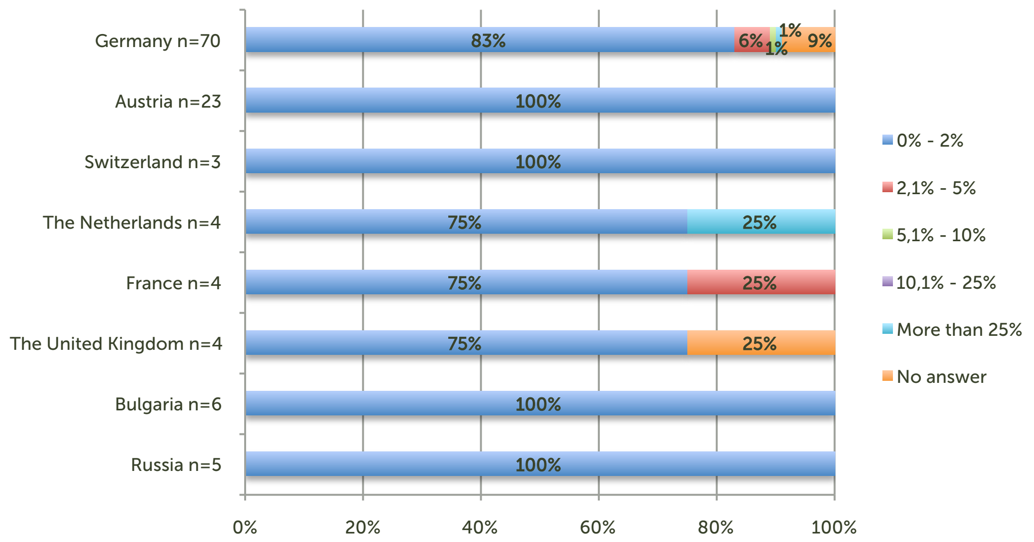


Fig. 26 | eco – Association of the German Internet Industry, Registrar Atlas 2013

In the previous year, the Netherlands stood out from the other countries exactly in this area, too, in that it had great demand for DNSSEC. This can no doubt be explained by SIDN having created incentives for using DNSSEC. At the same time, this example also shows that only the creation of incentives can promote the use of DNSSEC. Conversely, this means that nothing is going to happen with respect to DNSSEC unless the registries do something to promote its use in cooperation with the registrars. This trend is certainly not statistically relevant due to the small number of responses from the Netherlands. Even so, when considering the previous year's responses, it is obvious that the two results are correlated.

Accordingly, the responses to the following question tell us whether there was great, little or no demand for DNSSEC among the customers of the participating companies. In contrast to the previous year, there is no longer a lot of demand in the Netherlands in this respect but only some demand – as, incidentally, in some of the other markets as well. Interestingly, the share of companies that have detected some demand for DNSSEC is largest in Germany at 34%. In the further course of this study we will see, however, that this demand has actually not been reflected in greater use of DNSSEC on the part of the providers over the three years in which we have conducted our survey.

IS THERE DEMAND FOR DNSSEC AMONG YOUR CUSTOMERS?

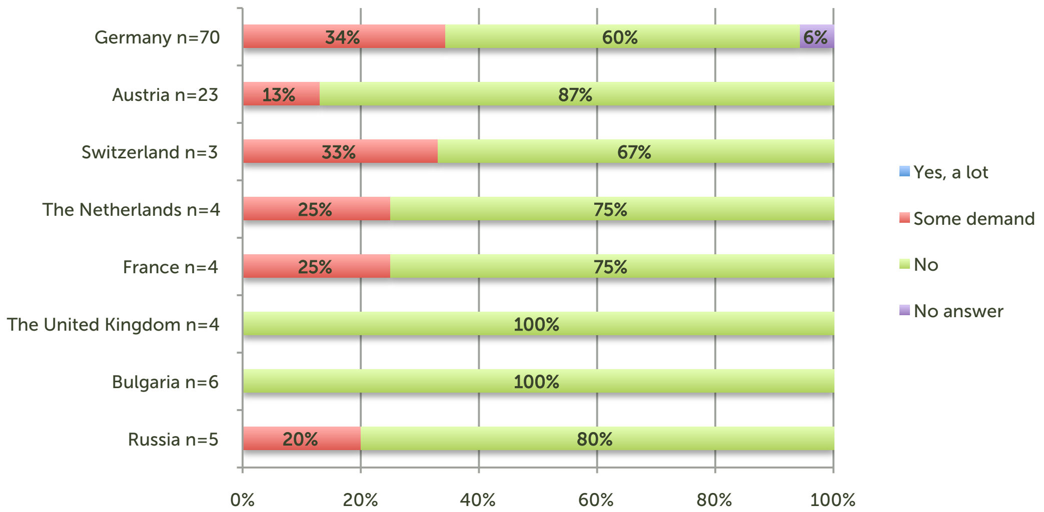


Fig. 27 | eco – Association of the German Internet Industry, Registrar Atlas 2013

C. Questions about services/marketing

The responses to the question of how the companies keep in touch with their resellers showed that, of the answer options offered, the ones that were least popular and least used were those that required personal meetings. Visits with the resellers and organising events for the resellers received the least number of ticks.

HOW DO YOU KEEP IN TOUCH WITH YOUR RESELLERS?
MUTIPLE ANSWERS POSSIBLE

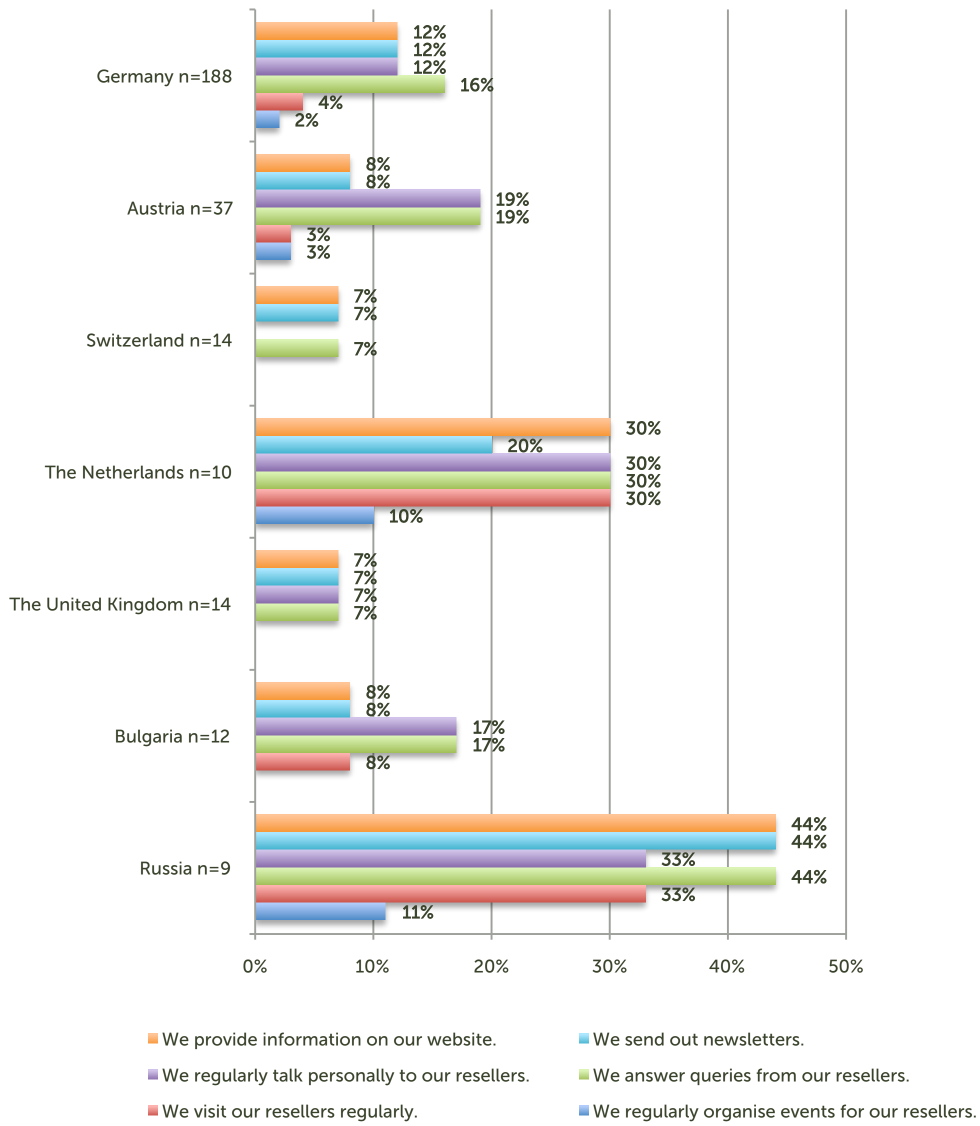
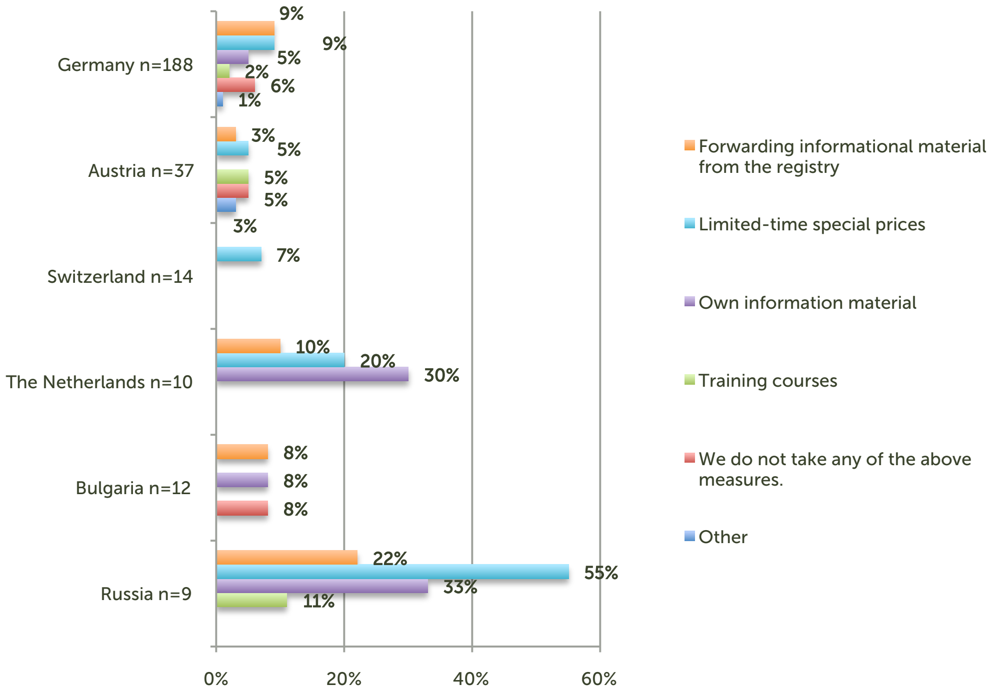


Fig. 28 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The responses to the question of how the companies support the sales efforts of the resellers showed that generating their own information materials and conducting training courses are less common in the market than forwarding information material on the part of the registries and limited-time special price campaigns. It is interesting to note, however, that the number of companies that forward to their resellers information materials which have already been prepared by the registries is not larger. After all, this kind of activity probably requires the least amount of resources.

WE ASSIST OUR RESELLERS IN THEIR SALES PROMOTION BY WAY OF:
MULTIPLE ANSWERS POSSIBLE

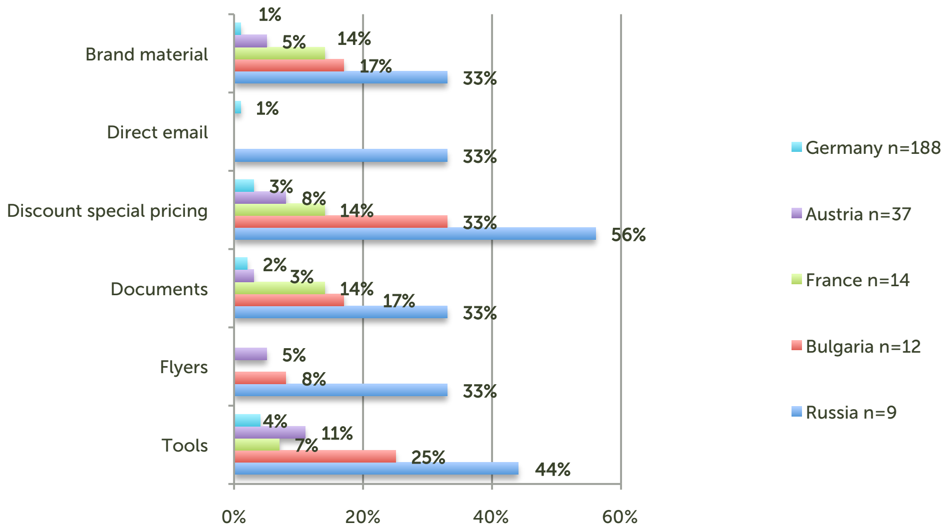


*No answers from France and The United Kingdom

Fig. 29 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The answers to the question of what kind of sales support the reseller would like to receive more of showed that direct email was the one that was least desired. Most providers prefer price benefits.

PLEASE INDICATE WHAT KIND OF SALES SUPPORT YOU WISH TO SEE MORE AS A RESELLER.
MULTIPLE ANSWERS POSSIBLE

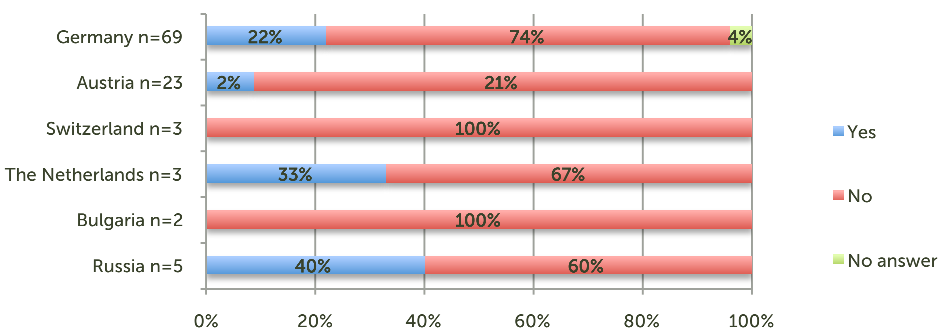


*No answers from The Netherlands, France and The United Kingdom

Fig. 30 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The prevailing lack of enthusiasm with respect to marketing activities can also be noted vis-à-vis the resellers the companies handle. Only few participants stated in response to the question of whether they support resellers in their marketing efforts that they provide any support at all.

ARE YOU ACTIVELY ENGAGED IN MARKETING ISSUES WITH YOUR RESELLERS?



*No answers from France and The United Kingdom

Fig. 31 | eco – Association of the German Internet Industry, Registrar Atlas 2013

With the following question we tried to find out how active the providers are in the marketing of domain names. Even though not enough answers were given in all countries to call the results representative, it is still clear that the level of activity can altogether still be increased in the area of marketing. Slight changes can be detected for Germany and Austria. Interestingly, in both countries a slightly larger number of providers stated that they do not actively market domain names at all. In Germany, the figure changed from 20% to 24% and in Austria from 21% to 26%. We are pleased to note that in Germany there was an improvement on the other end of the spectrum, as 16% stated they were very active in marketing domain names compared to 9% in the previous year.

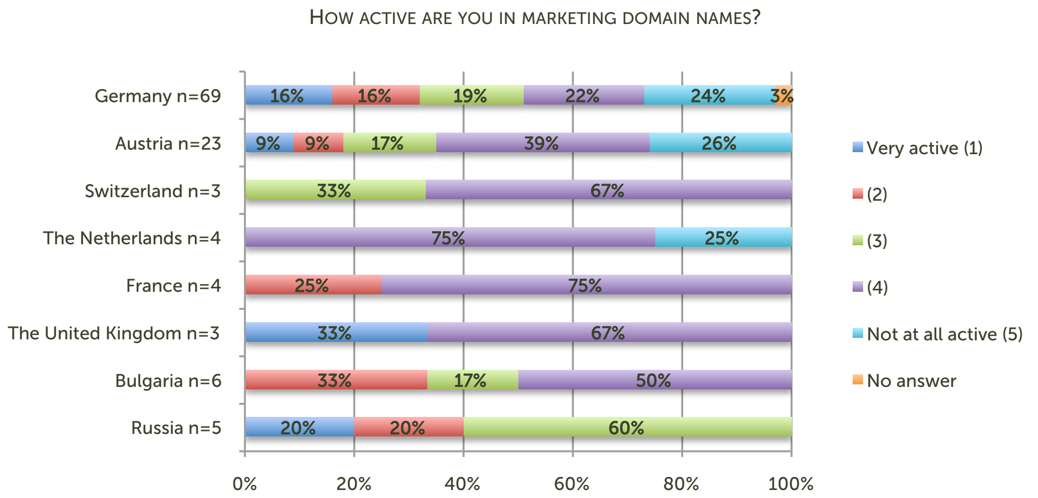


Fig. 32 | eco – Association of the German Internet Industry, Registrar Atlas 2013

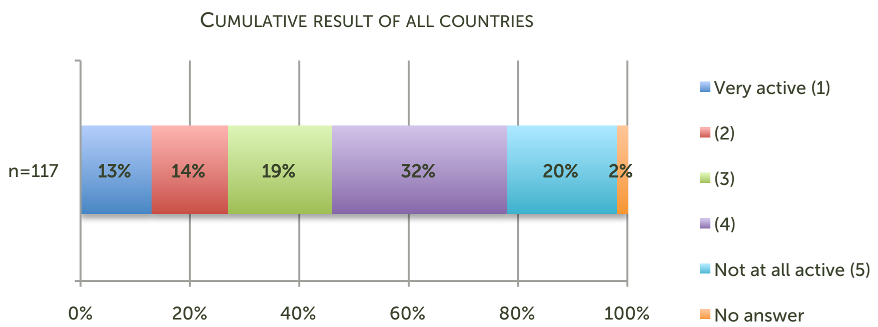


Fig. 33 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Furthermore, we wanted to know whether the providers would like more sales support from the registries or the companies from which they buy the domain names, or if they are satisfied with the current support. The answers largely confirm what was becoming apparent in the previous year, namely that the respondents tend to be satisfied with the registries and the companies supplying them. Only the participants from France indicated that none of them are satisfied with the current level of support, but that they are hoping for more support both from the registries and the companies supplying them.

WOULD YOU AS A RESELLER WISH TO SEE MORE SALES SUPPORT?
MULTIPLE ANSWERS POSSIBLE

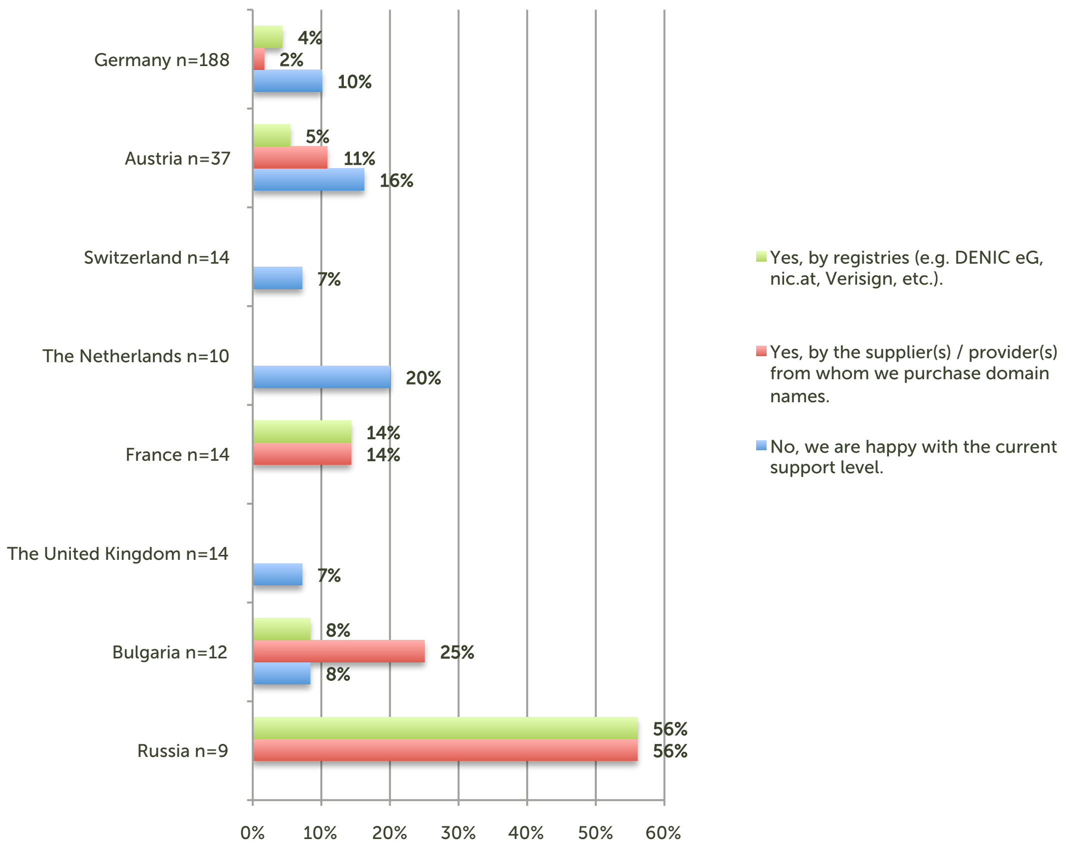


Fig. 34 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The answers to the question of whether price, technical availability or personal availability and support are crucial for the relationship with their customers showed that prices and personal availability are particularly important.

WHICH CRITERIA ARE PARTICULARY IMPORTANT TO YOU IN THE CUSTOMER RELATIONSHIP WITH YOUR REGISTRANTS OR YOUR RESELLERS?

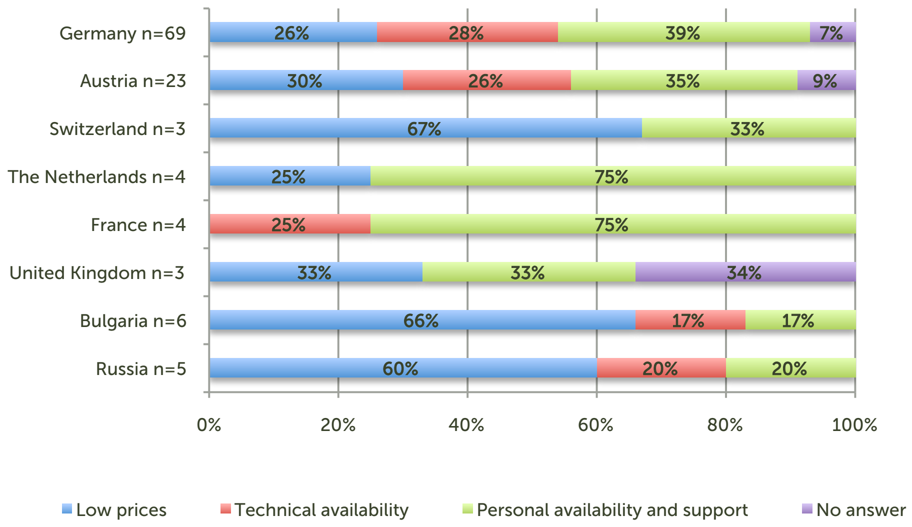


Fig. 35 | eco – Association of the German Internet Industry, Registrar Atlas 2013

CUMULATIVE RESULT OF AL COUNTRIES

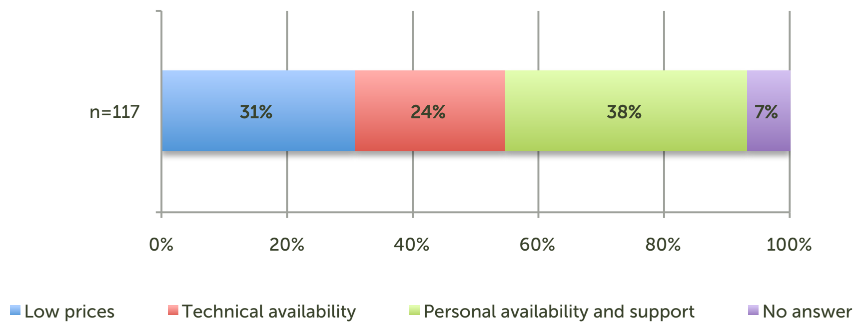


Fig. 36 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The answer to the question of satisfaction – on the one hand with the service of the suppliers of the Domain provider, and on the other with the Registries – are found in the next two graphs.

As in previous years, it is clear that the participants in the study are predominantly satified with the performance of their business partners.

HOW SATISFIED ARE YOU WITH THE SERVICE OF THE SUPPLIER(S)/PROVIDER(S) FROM WHOM YOU PURCHASE DOMAIN NAMES?

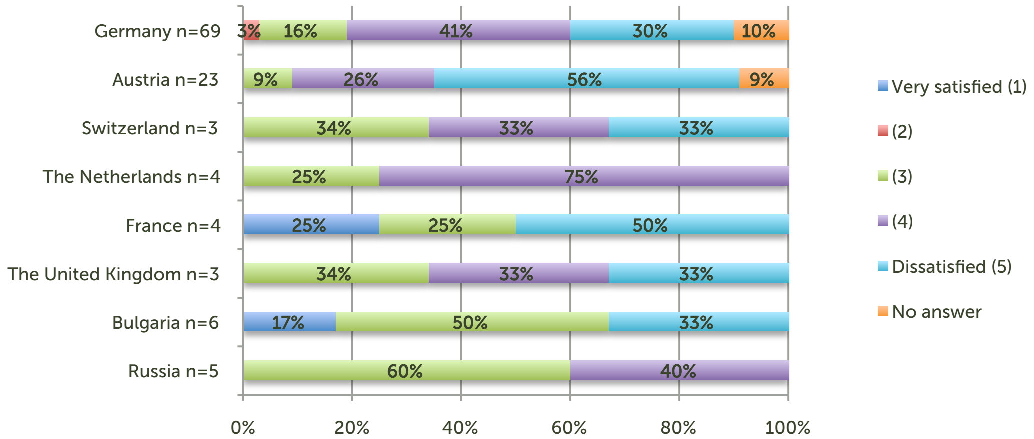


Fig. 37 | eco – Association of the German Internet Industry, Registrar Atlas 2013

HOW SATISFIED ARE YOU WITH THE SERVICE OF THE REGISTRIES WHERE YOU ARE ACCREDITED?

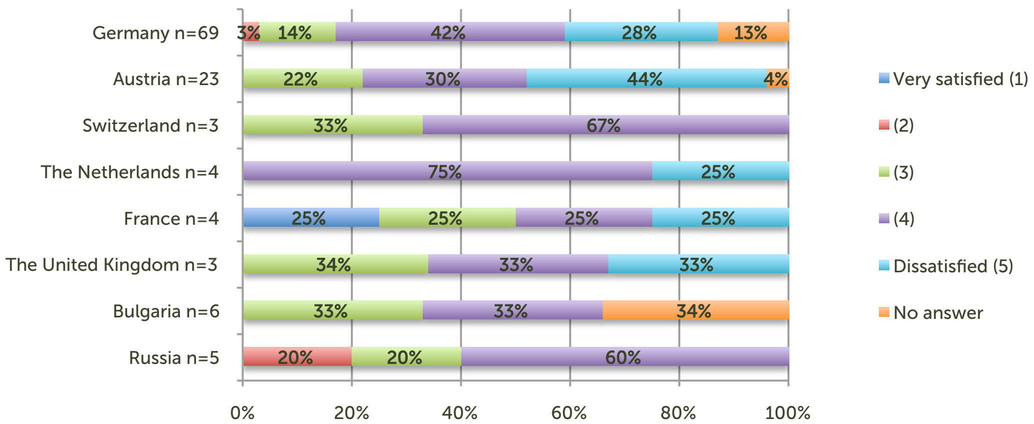


Fig. 38 eco – Association of the German Internet Industry, Registrar Atlas 2013

The answers to the previous question concerning the degree of satisfaction with the "domain name supplier" is correlated with the question of whether the participants are planning to change their suppliers within the next twelve months. For the most part this is not the case. The following answers, however, are noteworthy: despite the few answers from France and Bulgaria, it turns out that the dissatisfaction with the suppliers in France does not result in a switch – whereas in Bulgaria, the dissatisfaction does in fact lead to plans of changing suppliers. In the Netherlands and in Germany, companies are likely to switch suppliers even though there was no, or hardly any, dissatisfaction. Surely only the data from Germany is relevant, where no one expressed dissatisfaction and only 3% said they were not satisfied, but 12% of providers are planning to switch. Does this already indicate a strategic realignment towards more powerful domain name providers in anticipation of the introduction of the new TLDs? We will continue to observe this.

ARE YOU PLANNING TO SWITCH YOUR DOMAIN NAME SUPPLIERS WITHIN THE NEXT 12 MONTHS?

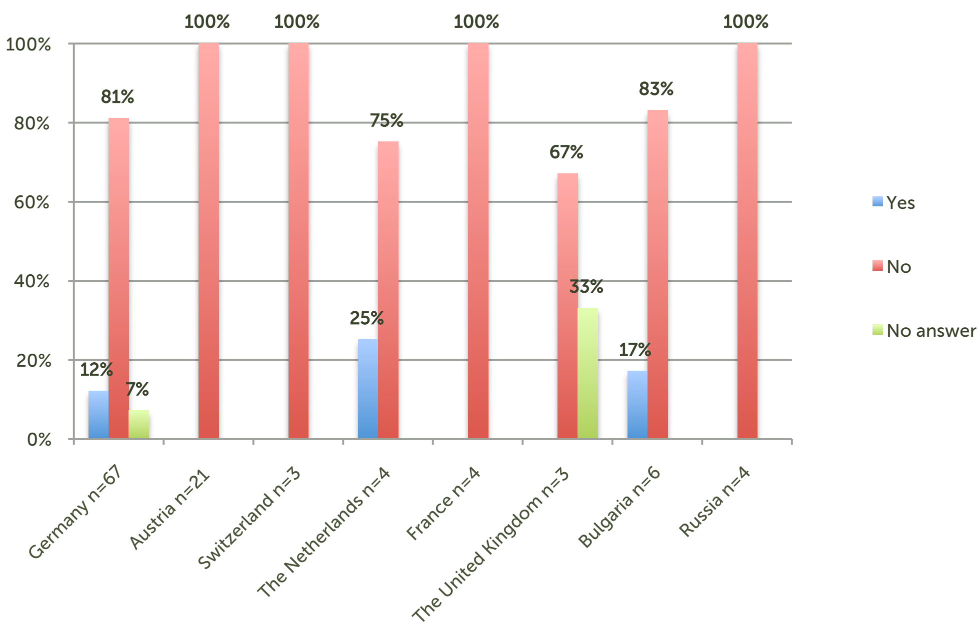


Fig. 39 | eco – Association of the German Internet Industry, Registrar Atlas 2013

D. Questions about trends

In light of the forthcoming introduction of the new generic top-level domain names (gTLDs), we asked the participants whether they were going to change their accreditations. The results allow us to draw some conclusions about the attitude of the registrars towards the new suffixes. To begin with, it is conspicuous that only participants from Germany and France stated that they do not want new TLDs at all. Of 188 respondents from Germany, the number of companies who do not want to open themselves to these new market opportunities is surprisingly large, at 8%. At the other end of the spectrum – i.e. getting as many accreditations for new gTLDs as possible – reservations are similarly great. In Germany, the share of these companies is just as high as among the "total refusers" – 8%. In Austria only 3% of the respondents will try to offer the greatest range of domain names possible. In absolute figures, among the 37 Austrian companies that answered this question, there was only one provider who is pursuing the strategy of a comprehensive portfolio. In this context it is also worthy of note that in light of the forthcoming introduction of a large number of new extensions, only very few companies are planning to relinquish existing accreditations. Yet, how do most of those companies position themselves that are not adverse to the new TLDs, but that, on the other hand, are not planning to get a large range of own accreditations for new TLDs? Purely optically, the diagram shows immediately that there is a particularly high density of responses in two areas :

1. On the one hand, there is the answer option of the providers planning to offer new TLDs only as resellers. The main reason for this is surely that small providers especially have neither the human nor the financial resources to get accreditations from a large number of new registries. On the one hand, there is the effort of establishing the technical connection and complying with any special technical requests that may arise (for example, when using EPP extensions). Not only would they be compelled to closely examine a large number of contracts, they may also be required to pay deposits, which would be likely to stretch the limits of what many providers are able to do. The alternative of offering new TLDs only as a reseller saves the providers this expense and effort. Evidently, companies are willing to be content with a smaller profit margin as long as they can avoid getting their own accreditations. In this connection it should also be mentioned that providers who currently do not have an ICANN accreditation would first have to obtain one before being accredited with new registries, which would constitute an additional effort. It remains to be seen if the percentage of those companies who only want to act as resellers is going to increase. The reason is that in the current draft of the accreditation contract, ICANN requires new registries to offer their domain names only via registrars that have signed the RAA 2013. At the time this text was written, this was a not yet final accreditation contract for registrars which contained some demands on the part of ICANN that the registrars found unacceptable. These specifically include a reservation on the part of ICANN to be allowed to modify the contract unilaterally on the basis of a resolution by the board of directors passed with a 2/3 majority. Registrars therefore are tending more and more towards back-pedalling, saying that they might not sign the RAA 2013 and instead offer new TLDs only as resellers. Whether registrars choose this option will largely depend on the further development of the RAA. Perhaps the figures provided by next year's survey will allow us to draw conclusions on this matter.

2. Even those providers who stated that they will try to get accreditations for new TLDs do not necessarily do so without reservations. A larger number of respondents stated that they are not going to offer new TLDs until these are generally available. A far smaller number of providers will include the pertinent domain names in their portfolio from day one, that is to say, during the so-called sunrise phase, which grants trademark owners the privilege of

preferred reservations. This also shows that the providers wish to avoid the investment of extra time and work and therefore want to circumvent the complex efforts which the sunrise phase – or any other phase – involves, which is planned by the respective provider prior to the general availability of the TLD. What does not quite fit into this concept of a provision of new, virtually “worry-free” extensions is the fact that the majority of providers are not going to offer the new suffixes until the initial phase of the so-called trademark claim service is over. The effort involved includes not only the technical connection and compliance with any special technical requests (for example, by using EPP extensions). It will also be necessary to closely examine a large number of contracts as well as to pay deposits, which would be likely to stretch the limits of what many providers can do. Relatively few providers regard this as a considerable obstacle that keeps them from offering the respective TLD already during this phase. In the course of the next study we might ask the participants whether the new requirements established by ICANN during the introduction of new TLDs have resulted in a greater amount of support for customers: moreover, it will be interesting to find out if the providers are going to change their strategy one way or the other concerning further new introductions in this context; that is to say, if they either decide to offer more TLDs during the sunrise phase anyway or not to offer the domain names until after the trademark claims notice phase after all. In conclusion, concerning the answers to this question it should be noted that, interestingly, more respondents stated they wanted to acquire accreditations for already existing TLDs than for new TLDs. This does seem to imply that the providers assume that the significance of the currently existing suffixes is not going to decline or will not decline with respect to the business to be expected. Instead, they partly believe the familiar suffixes to be more important even than new extensions.

ARE YOU PLANNING TO MODIFY / CHANGE THE NUMBER OF ACCREDITATIONS?
MULTIPLE ANSWERS POSSIBLE

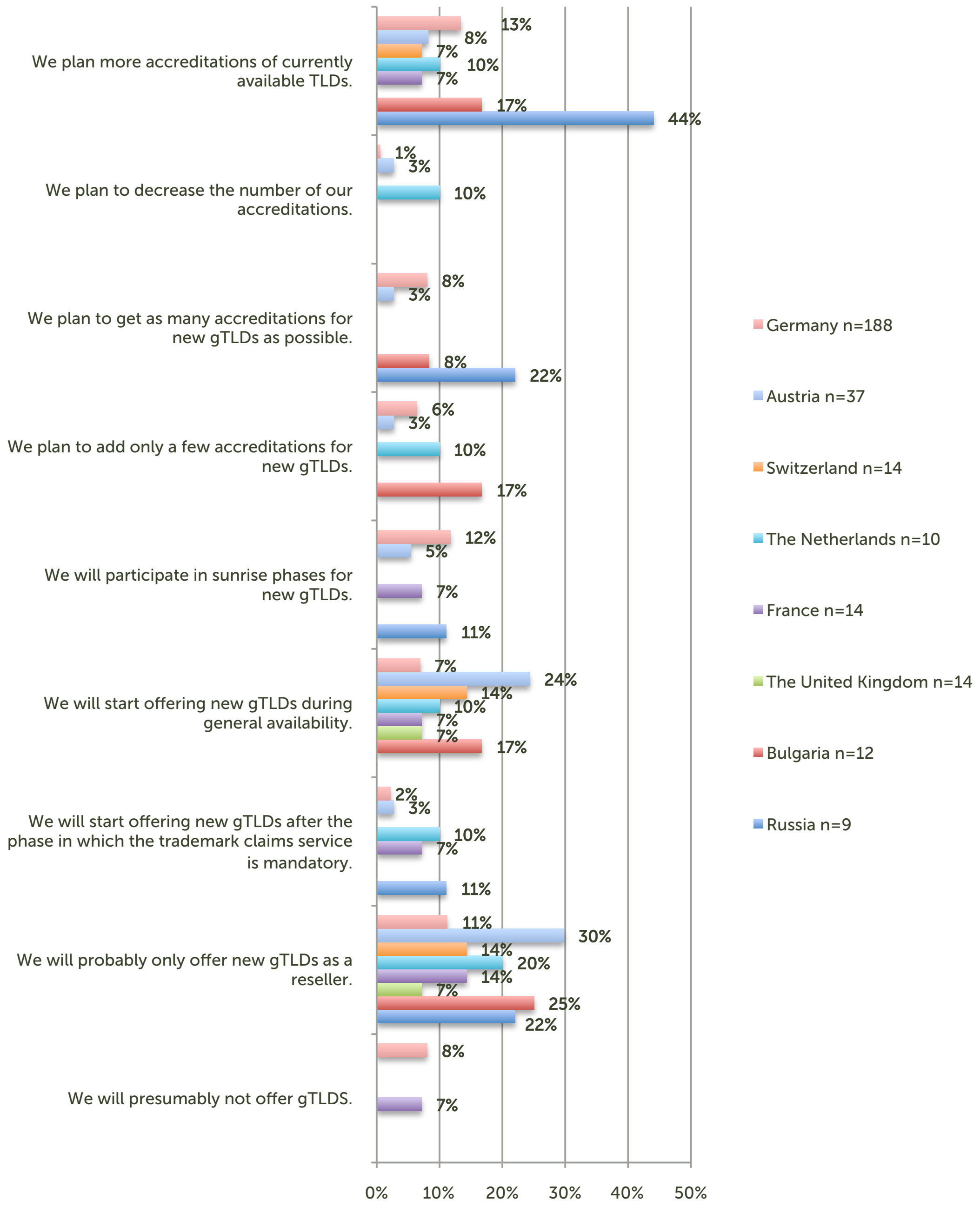


Fig. 40 | eco – Association of the German Internet Industry, Registrar Atlas 2013

With the question of which innovations or additional services the companies are planning in the near future, we wanted to identify developments in the market and pertinent trends. The participants were able to indicate whether they were already offering a number of different services, are going to offer them within the next year or do not intend to offer them at all. We have the respective comparative figures for Germany for the previous year. Unfortunately, it must be noted that the companies have apparently not implemented their plans of rolling out additional services. On the contrary, the results show that the share of companies that stated they were already offering certain services has declined even further. Even though this may be attributable to our including other companies in this year's study, we must still note a general trend towards companies for the most part tending to have plans but failing to implement them. DNSSEC can once again serve as a prime example of this. Last year we noted that after the first study, where 17% of the participants stated they were already offering DNSSEC and 45% stated that they were planning to introduce it within the next twelve months, we should have recorded a market penetration of 62% in the following (that is to say, last) year. In fact, however, the figure was only 19%. If we add to this figure of 19% the 37% of companies that promised to introduce DNSSEC within twelve months, the figure should now be at 56%.

WHICH INNOVATIONS OR ADDTIONAL SERVICES ARE YOU PLANNING TO OFFER YOUR CUSTOMERS WITHIN THE NEXT 12 MONTHS?

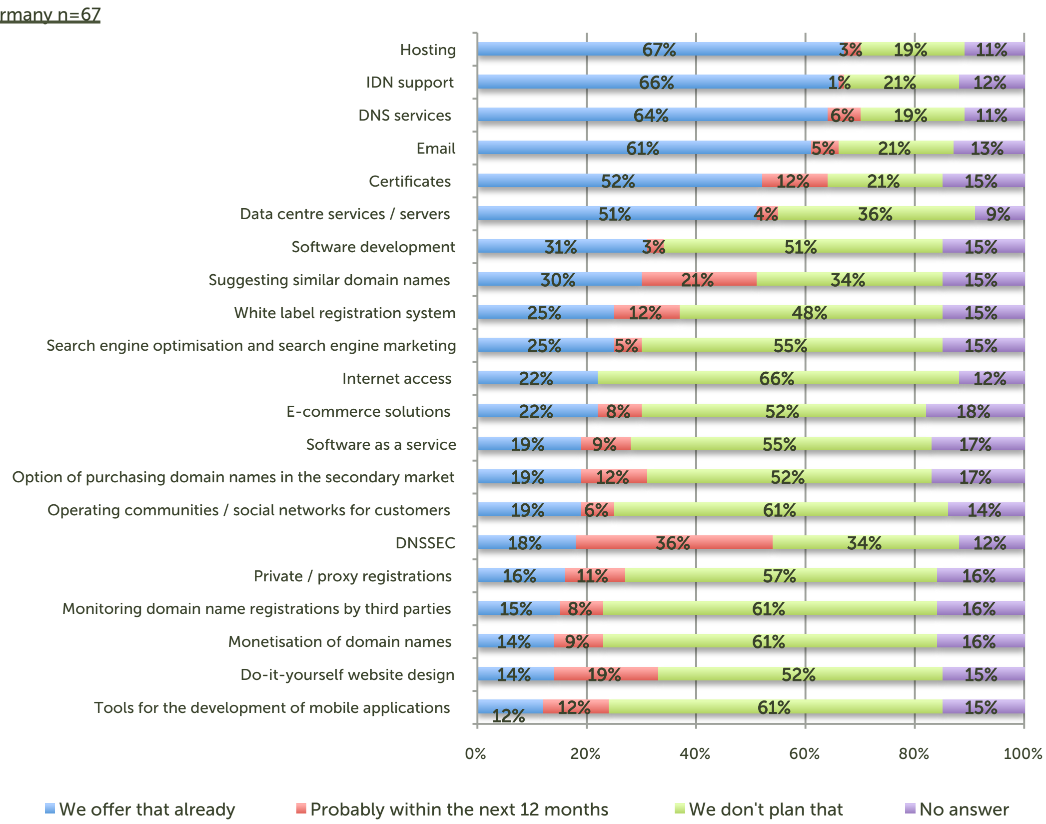


Fig. 41 | eco – Association of the German Internet Industry, Registrar Atlas 2013

In point of fact, however, this year 18% of companies stated they were already implementing DNSSEC, and 36% that they are planning to do so next year. DNSSEC was the service which the largest number of companies were planning on implementing within the next twelve months. However, this has not happened yet. We also believed we were able to note a slightly positive development in the past year, for example with respect to offering alternative suggestions if the desired domain name is no longer available. This year, the share of companies that stated they were already doing this dropped from 42% to 30%. Nevertheless, a solid 21% of companies are already planning on doing so. This was more than the 13% that said so last year. The expectations placed on themselves and their own product development have therefore not been met, at least not in Germany.

A slightly more positive general picture emerged in Austria. To stay with the last example of offering suggestions for similar domain names, the figure for companies already doing so climbed from 24% to 33%. This suggests that nearly all of the 11% that had planned an introduction within the next year have implemented their plan. What is more, a further 24% of survey participants are now planning to introduce this service. Another positive example is that of offering monetisation of domain names. Here, the share of companies already offering this increased from 5% to 10%.

WHICH INNOVATIONS OR ADDTIONAL SERVICES ARE YOU PLANNING TO OFFER YOUR CUSTOMERS WITHIN THE NEXT 12 MONTHS?

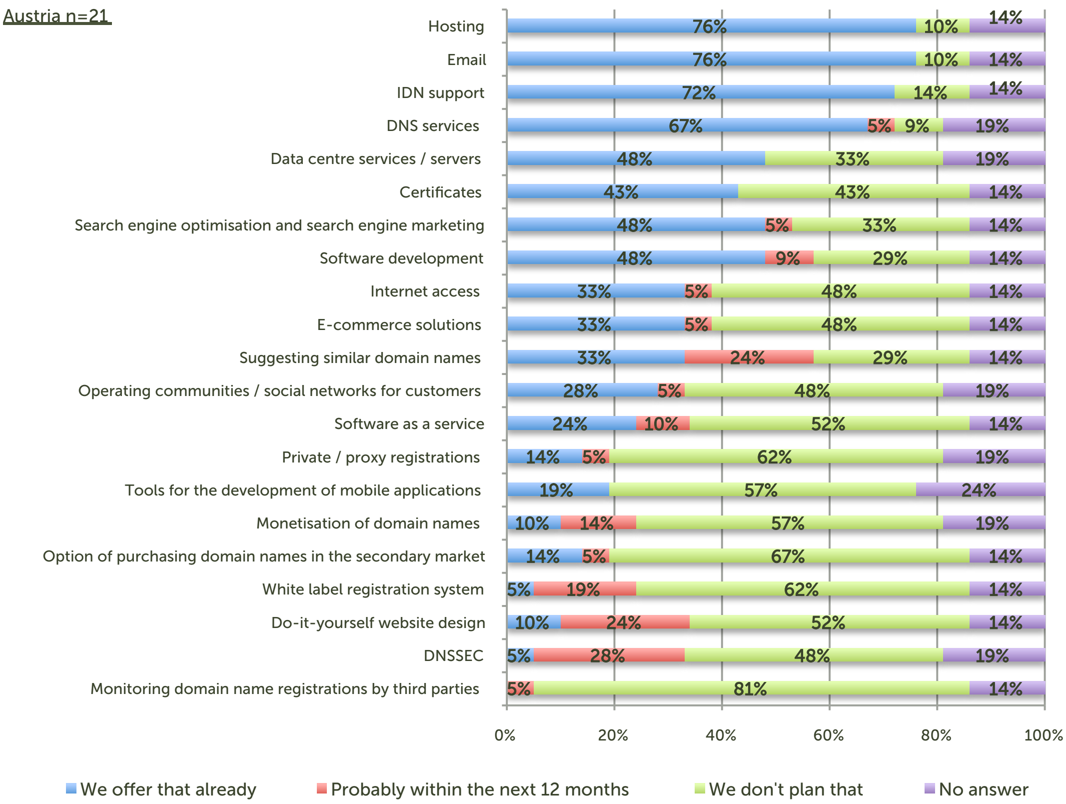


Fig. 42 | eco – Association of the German Internet Industry, Registrar Atlas 2013

In the current survey, 14% of companies are planning the introduction of this service within twelve months, but whether this will actually happen remains to be seen. On the downside, the share of companies offering, for example, the option of purchasing domain names in the secondary market has dropped from 22% to 14%. The share of those who are not planning on offering their customers services of this kind even climbed to 67% compared to 45% last year. It would be desirable to obtain more telling results about additional countries, too, in future, based on information provided by more survey participants. For the time being, we should note that the industry sector is generally marked by having good intentions rather than actually implementing them. It remains to be seen if the introduction of new TLDs and the substantial effort involved on the part of the providers will lead to greater market penetration of reseller platforms, via which the domain name providers can offer a large number of different extensions without themselves being accredited with the respective registries. A positive effect for the customers of the pertinent providers would not only be that this might give them access to a much greater selection of extensions. In many instances, the reseller platforms provide additional services such as offering domain names in the secondary market and making suggestions for similar domain names without the providers having to technically implement the respective services themselves.

We again asked this year's survey participants whether they assume that the use of search engines for finding information may constitute a danger for the domain name business. In Germany, the answers were approximately the same as in the previous year. In Austria, the general mood is different this year. While last year 26% of the participants stated that search engines constituted no threat whatsoever to the domain name business, this percentage has now dwindled to 5%. The share of those companies that see a considerable and great threat is now at a total of 43% compared to 20% in the previous year.

DO THE FOLLOWING ISSUES CONSTITUTE A THREAT FOR THE DOMAIN NAME BUSINESS IN YOUR OPINION?
"CUSTOMERS USE SEARCH ENGINES RATHER THAN DOMAIN NAMES FOR FINDING INFORMATION."

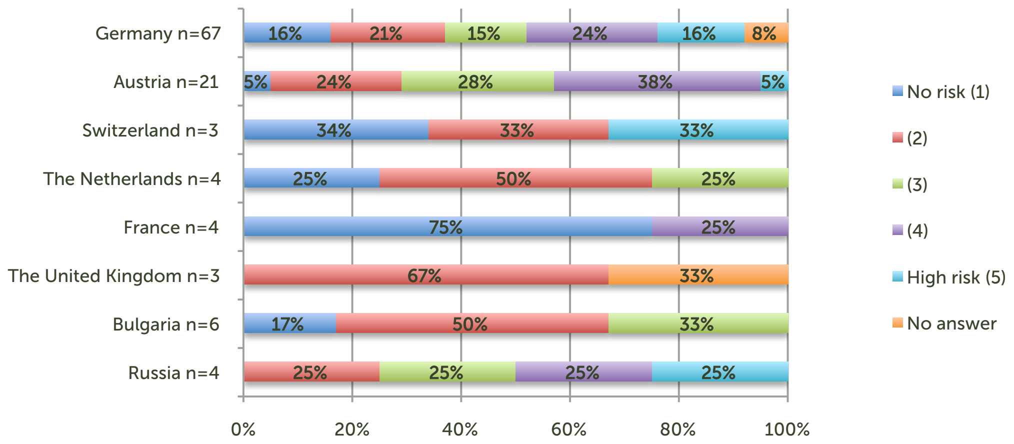


Fig. 43 | eco – Association of the German Internet Industry, Registrar Atlas 2013

CUMULATIVE RESULT OF ALL COUNTRIES

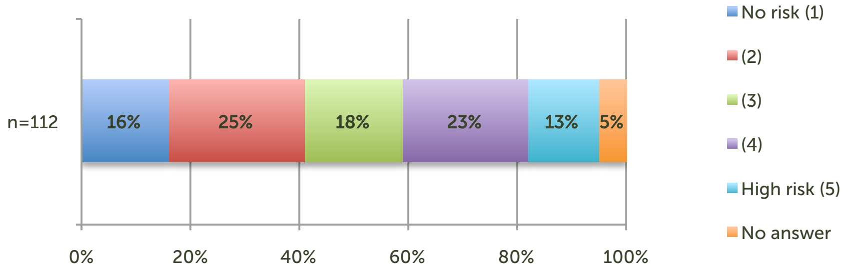


Fig. 44 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The reverse picture emerges regarding potential threats posed by the vanity URLs of social media websites. Last year, a total of 37% of the respondents in Germany believed that they were faced with a threat or even a major threat. This percentage has now declined to 21%. The situation is different in Austria, where the percentage of respondents who see a threat or major threat has increased from 27% to 38%.

Interestingly, the percentage of those who only see a minor threat also increased in Austria. It climbed from 21% to 43%. The group of those assuming a position between those seeing a threat and those seeing no threat has entirely disappeared. Apparently, these respondents have in the meantime decided to join either one or the other camp.

Do the following issues constitute a threat for the domain name business in your opinion?
"Customers use Vanity URLs of social media sites rather than their own domain name."

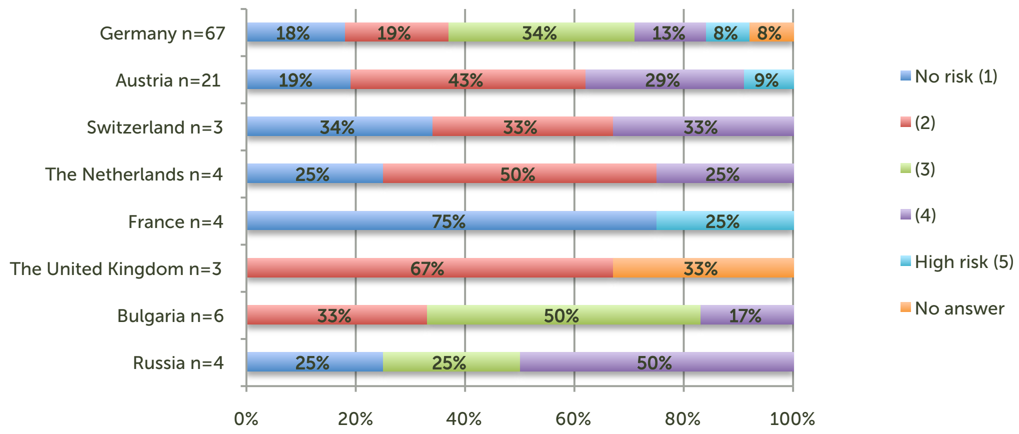


Fig. 45 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Cumulative result of all countries

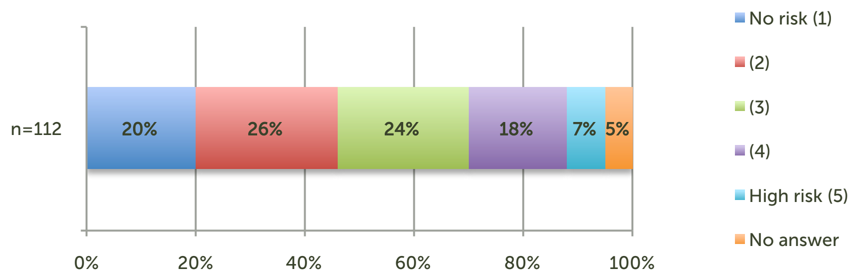


Fig. 46 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The greatest threat for the domain name business, however, is seen in the area of mobile devices, where the respondents recognised major competition for the domain name business, for example in the use of apps.

DO THE FOLLOWING ISSUES CONSTITUTE A THREAT FOR THE DOMAIN NAME BUSINESS IN YOUR OPINION?
"CUSTOMERS NO LONGER USE DOMAIN NAMES ON MOBILE DEVICES SUCH AS TABLETS OR SMARTPHONES, BUT APPS AND SEARCH ENGINES"

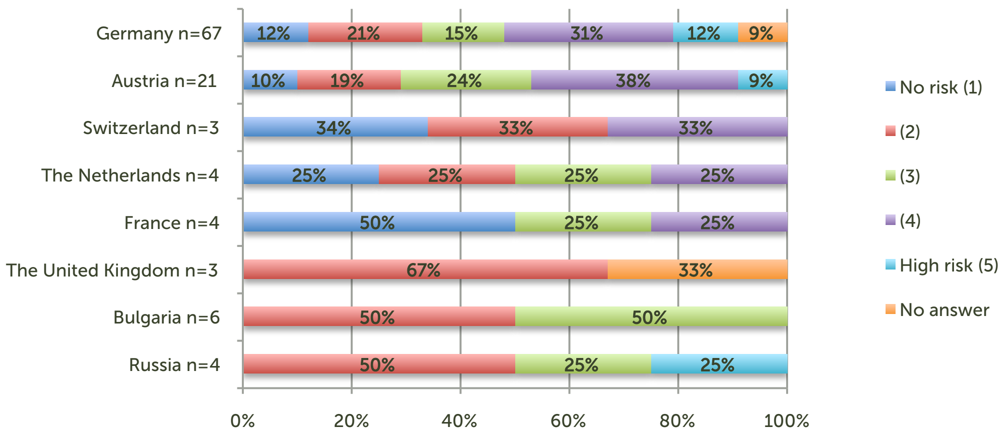


Fig. 47 | eco – Association of the German Internet Industry, Registrar Atlas 2013

CUMULATIVE RESULT OF ALL COUNTRIES

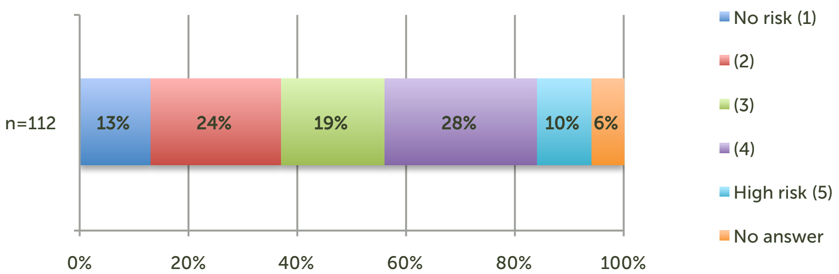


Fig. 48 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Subsequently, this year we again asked the participants about their expectations regarding the development of the domain name market, in general, and the development of their own business, in particular, over the next 24 months. They could choose between five levels ranging from strongly declining to strongly growing business. It is gratifying to note once again that the forecast of many companies is more positive with respect to the development of their own business than to the development of the domain name industry in general. A particularly large number of answers to this question came from Germany and Austria.

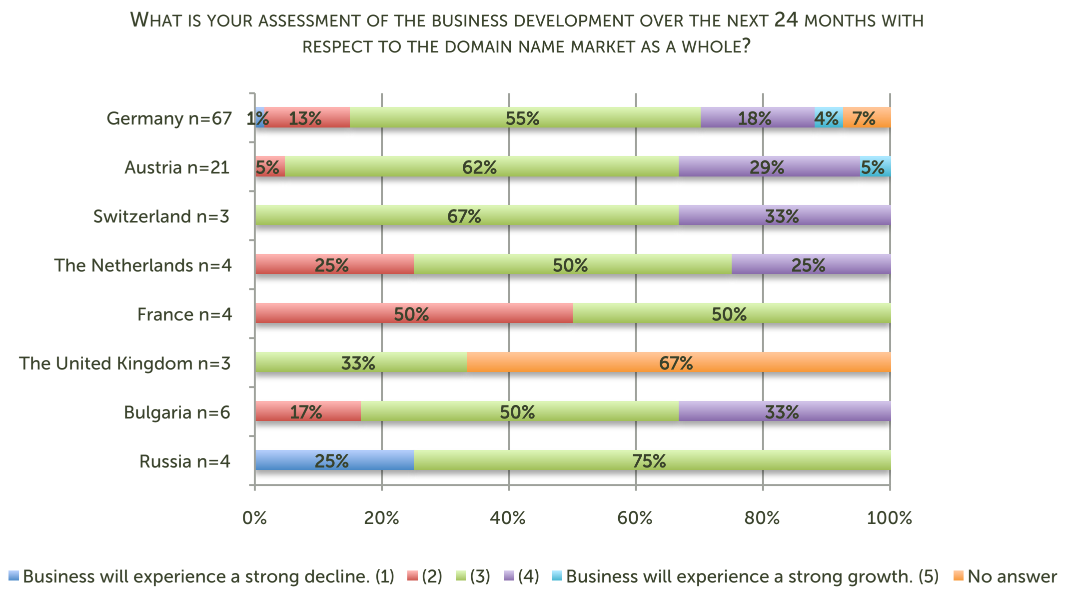


Fig. 49 | eco – Association of the German Internet Industry, Registrar Atlas 2013

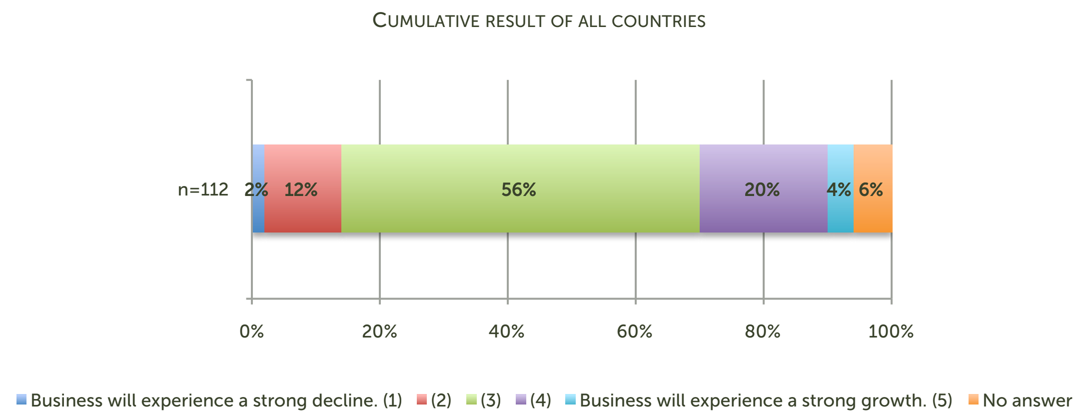


Fig. 50 | eco – Association of the German Internet Industry, Registrar Atlas 2013

It must be noted that there is altogether less optimism compared to the previous year. While last year 18% of the survey participants from Germany predicted that their company's business would show strong growth during the following year, this number has now dropped to 7%. Only 6% predicted that business would actually decline. In the current year this number climbed to 19%, and 3% even stated that business would be strongly declining. By comparison, the number of respondents in Austria who believe business will show strong growth increased from 2% to 10%.

WHAT IS YOUR ASSESSMENT OF THE BUSINESS DEVELOPMENT OVER THE NEXT 24 MONTHS WITH RESPECT TO THE DOMAIN NAME BUSINESS OF YOUR COMPANY?

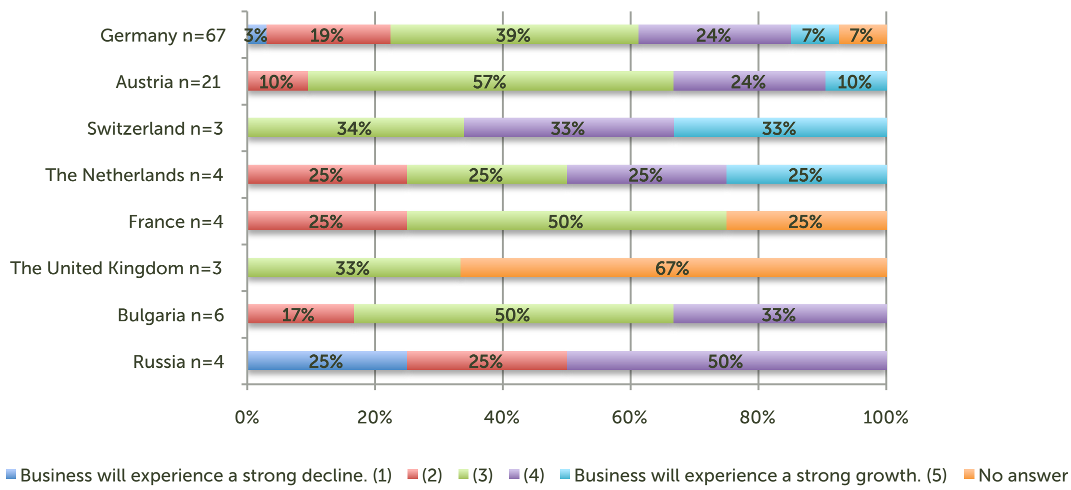


Fig. 51 | eco – Association of the German Internet Industry, Registrar Atlas 2013

CUMULATIVE RESULT OF ALL COUNTRIES

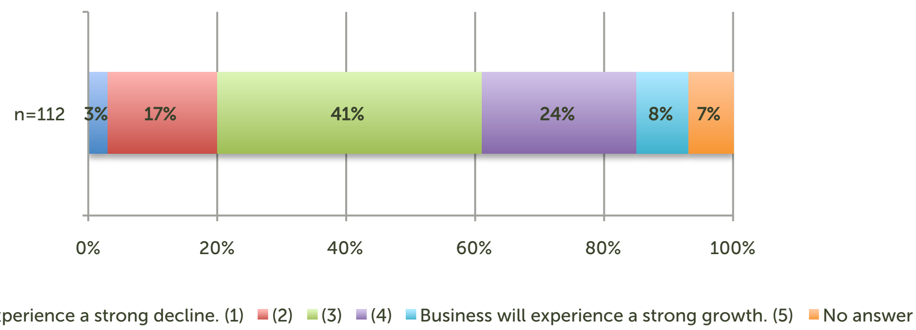
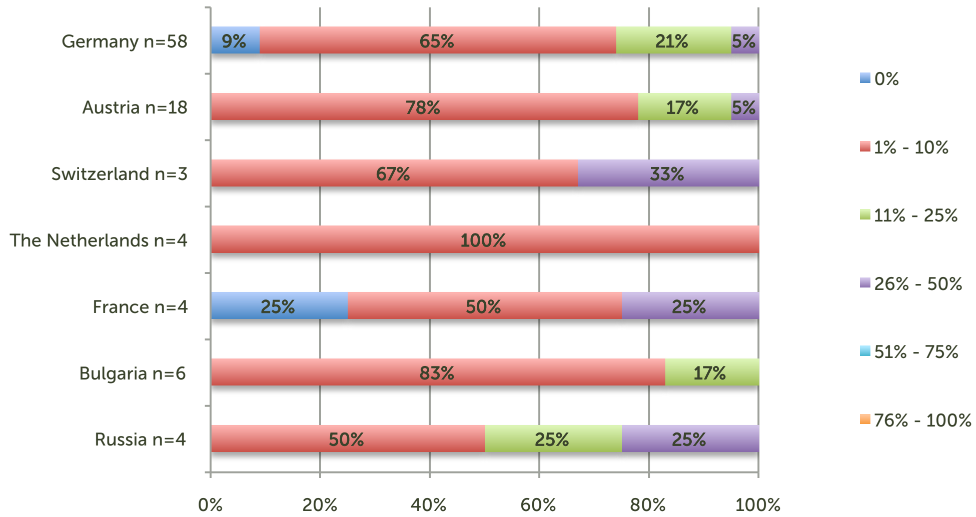


Fig. 52 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Furthermore, we asked the participants how large, in their estimate, the percentage of the new domain names will be compared to the overall size of the domain name portfolio they administer. The largest number of participants responded that this figure will be less than 10%. Some providers even expect that this figure will be up to 50%. It remains to be seen whether these estimates will be confirmed.

HOW HIGH DO YOU THINK THE PERCENTAGE OF NEW GTLD REGISTRATIONS WILL BE IN THE NEXT 5 YEARS COMPARED TO THE OVERALL SIZE OF THE DOMAIN PORTFOLIO YOU ADMINISTER?



*No answers from The United Kingdom

Fig. 53 | eco – Association of the German Internet Industry, Registrar Atlas 2013

In the block of questions we are about to discuss we asked the participants to estimate the prospects of new TLDs to be successful. We distinguished between geographic TLDs, generic TLDs, corporate TLDs and, for the first time, IDN TLDs. This theme was again concluded by the question of whether success will depend on the respective suffix, regardless of the category. As in the previous studies, it turned out that the providers do not believe any of the categories mentioned have excellent prospects for success per se.

HOW DO YOU ASSESS THE CHANCE OF SUCCESS FOR NEW TOP-LEVEL DOMAINS?
„GEOGRAPHIC TOP-LEVEL DOMAINS SUCH AS .BERLIN, .MINNESOTA OR .NYC"

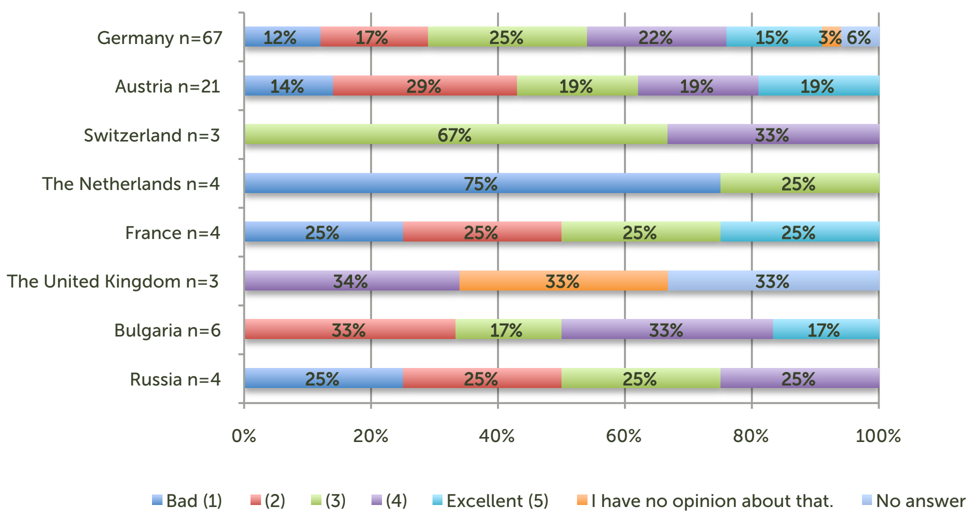


Fig. 54 | eco – Association of the German Internet Industry, Registrar Atlas 2013

CUMULATIVE RESULT OF THE COUNTRIES

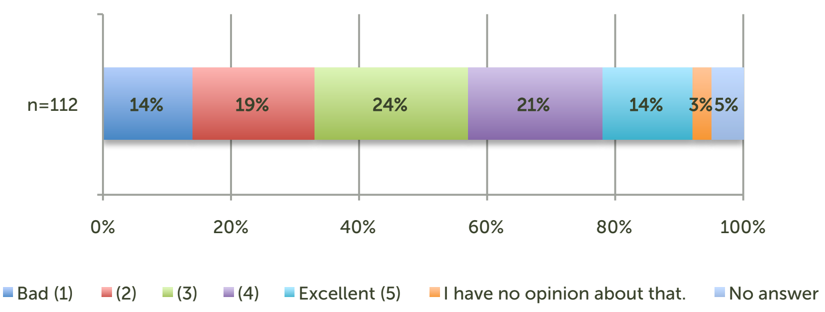


Fig. 55 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Rather, the providers believe that the success of the TLD depends on the specific string. For this reason, the providers will closely consider how promising the extension in question is in their opinion, regardless of whether it is a geographic or a generic term. This shows yet again that the registrars will be a significant factor in deciding whether new TLDs succeed or fail. Otherwise, the most positive general opinion, transcending national borders, exists about geographic TLDs.

HOW DO YOU ASSESS THE CHANCE OF SUCCESS FOR NEW TOP-LEVEL DOMAINS?
„GENERIC TOP-LEVEL DOMAINS SUCH AS .RADIO, .MOVIE OR .SPORT“

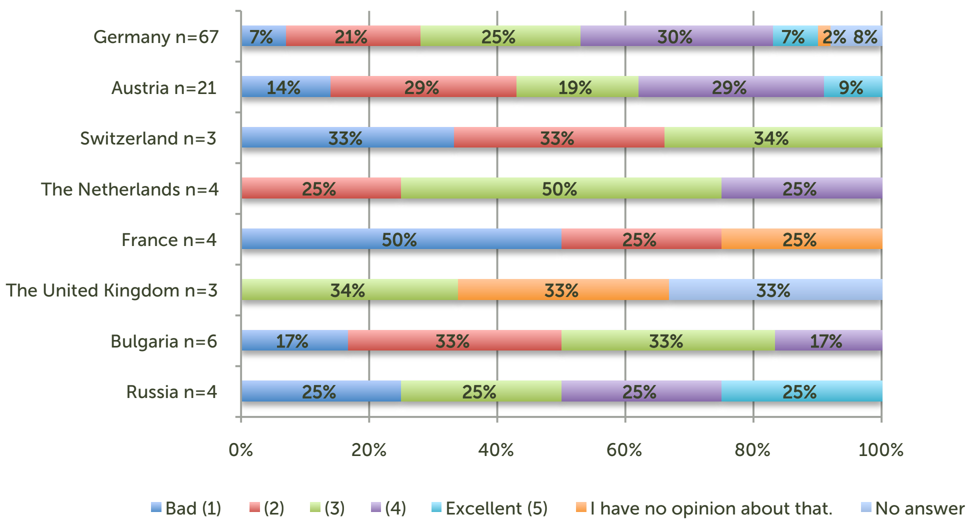


Fig. 56 | eco – Association of the German Internet Industry, Registrar Atlas 2013

CUMULATIVE RESULT OF ALL COUNTRIES

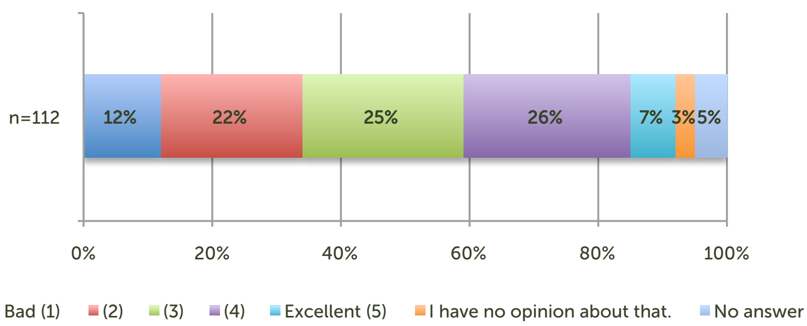


Fig. 57 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The most critical attitude can be detected towards corporate TLDs. This, however, can probably explained to a large extent by the fact that we surveyed registrars, while corporate TLDs are generally not sold to everybody but are primarily used for the specific companies' own purposes. Consequently, the reservation is likely due to the registrars not recognising any business in this area worth mentioning.

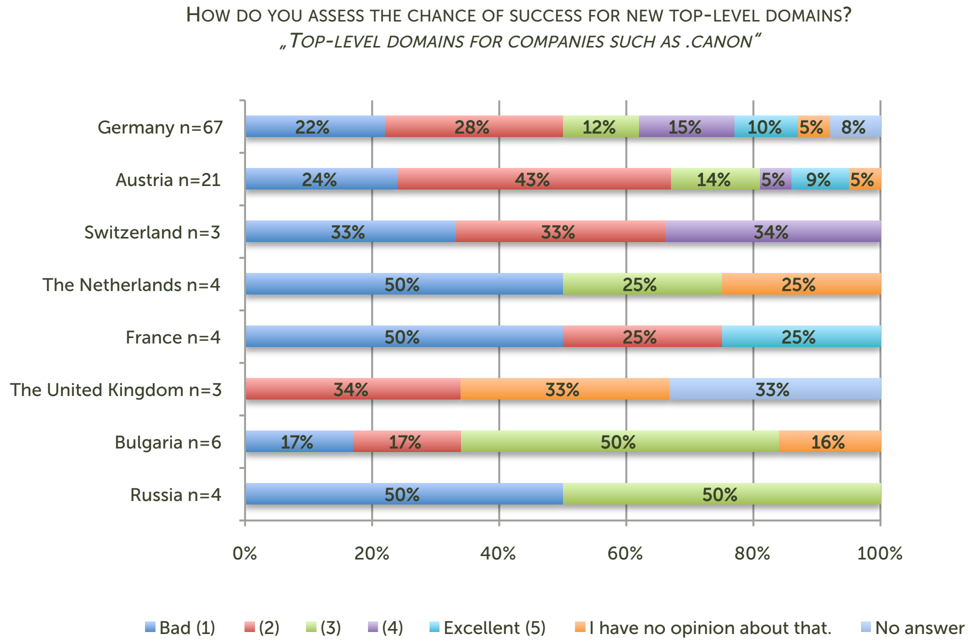


Fig. 58 | eco – Association of the German Internet Industry, Registrar Atlas 2013

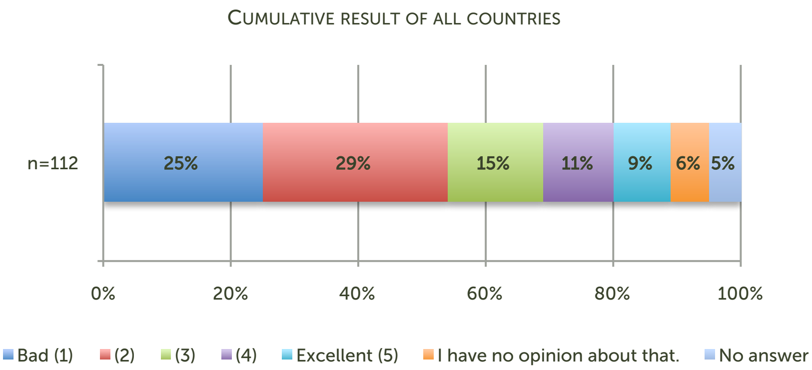


Fig. 59 | eco – Association of the German Internet Industry, Registrar Atlas 2013

HOW DO YOU ASSESS THE CHANCE OF SUCCESS FOR NEW TOP-LEVEL DOMAINS?
„IDN - TOP-LEVEL DOMAINS"

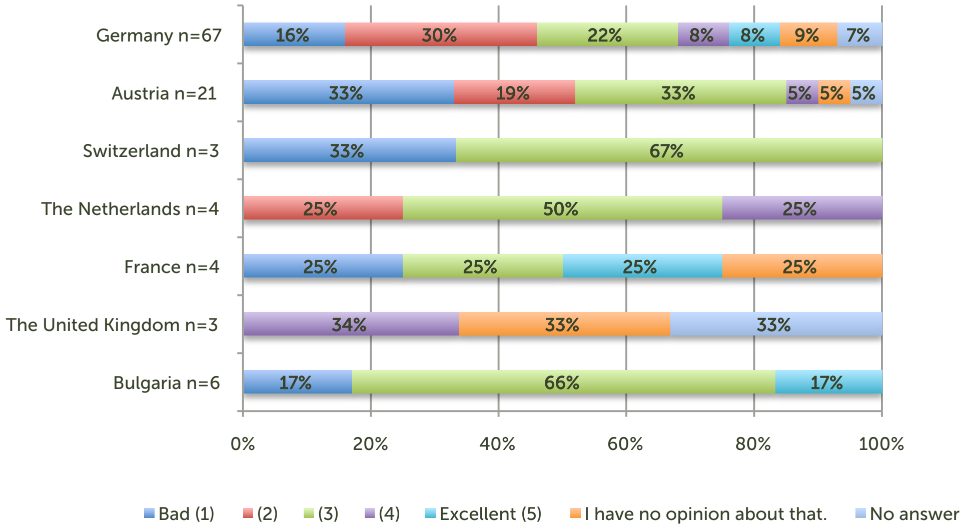


Fig. 60 | eco – Association of the German Internet Industry, Registrar Atlas 2013

CUMULATIVE RESULT OF ALL COUNTRIES

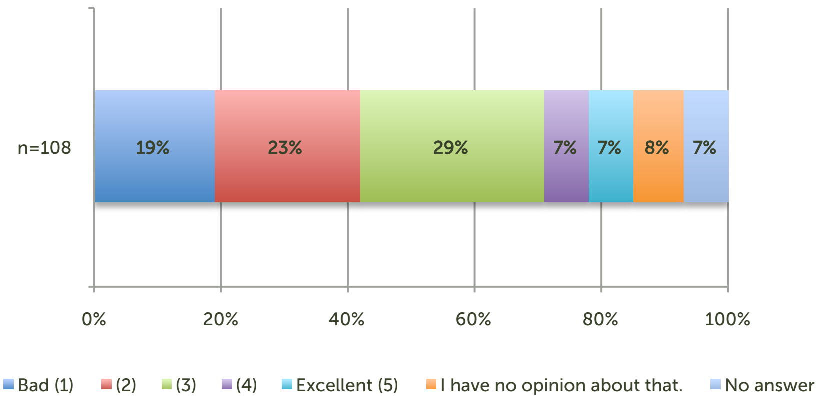


Fig. 61 | eco – Association of the German Internet Industry, Registrar Atlas 2013

How do you assess the chance of success for new top-level domains?
"The success will strongly depend on the specific top level domain."

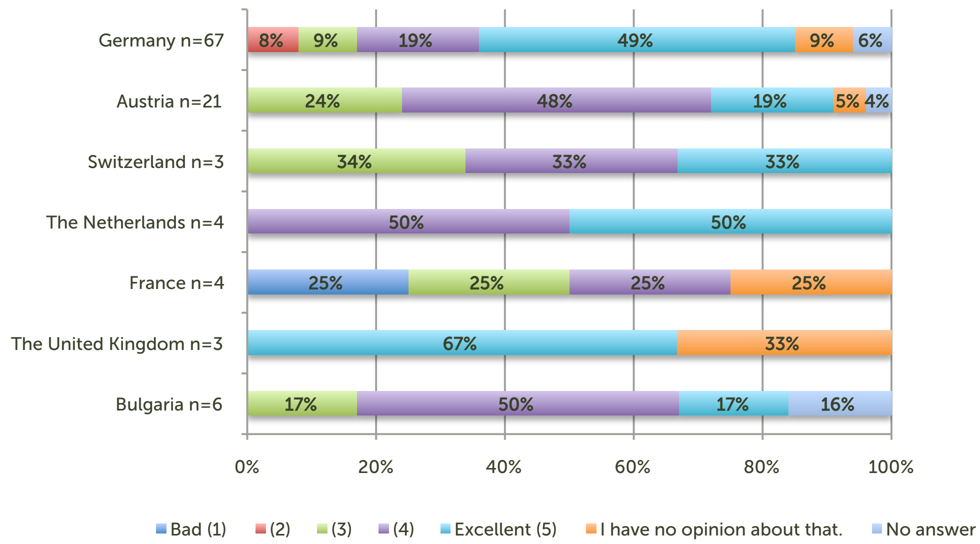


Fig. 62 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Cumulative result odf all countries

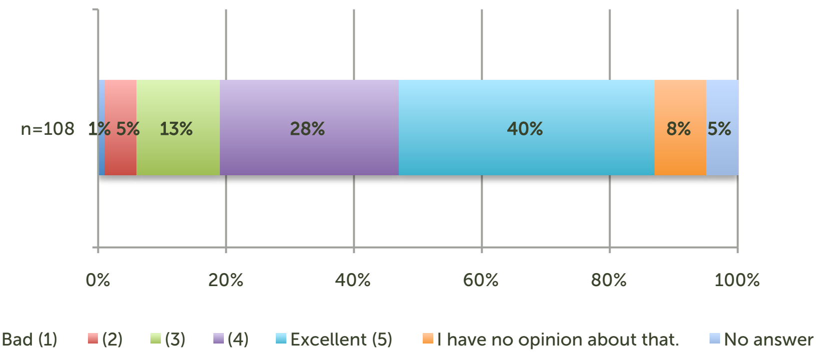


Fig. 63 | eco – Association of the German Internet Industry, Registrar Atlas 2013

The introduction of new TLDs was perhaps still in the all too distant future for some providers during last year's study. However we now have reliable introduction data for the first time in the history of ICANN. Despite the greater planning security that now exists, the vast majority of providers still do not seem to be prepared to expend a special promotion effort on behalf of new TLDs. The operators of new namespaces can therefore not depend on receiving significant support from the registrars.

Registrars will provide fewer resources for promoting new TLDs and will have to set priorities, also in light of the possibility of, at the same time, giving a large number of new extensions appropriate visibility. This prioritisation will not only concern the selection of those TLDs that are offered by the registrars to begin with, but also in the way information is made accessible to existing and prospective customers.

WILL YOU CONDUCT SPECIAL MARKETING ACTIVITIES FOR THE LAUNCH OF NEW GTLDS?

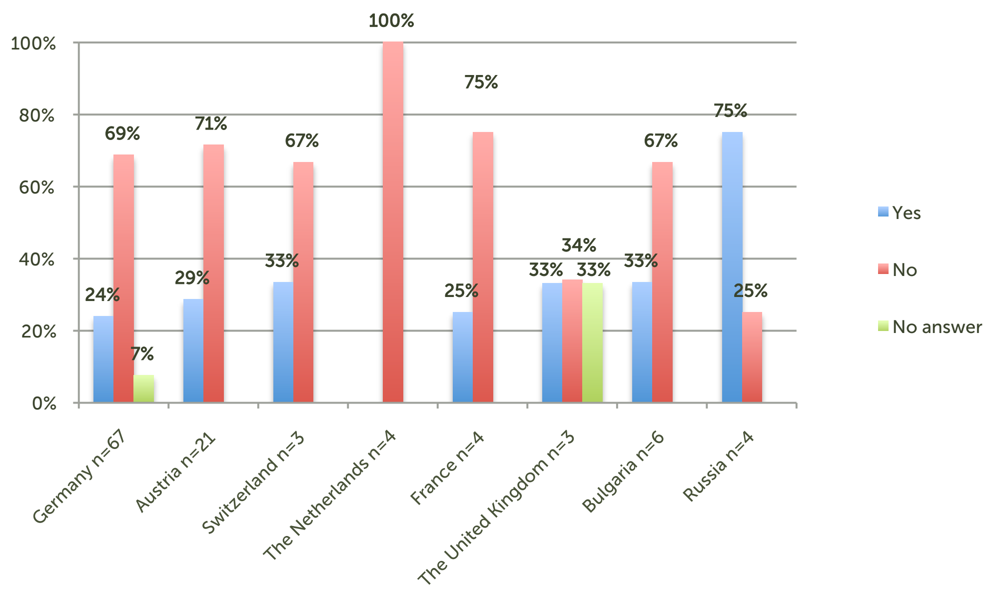


Fig. 64 | eco – Association of the German Internet Industry, Registrar Atlas 2013

That some providers will charge for activities of this kind is obvious. Conversely, however, this also means that the providers who stated that they were not planning on becoming active in the marketing of new gTLDs did not intend to capitalise on giving specific new TLDs special visibility. However, the operators of new namespaces can themselves change a few parameters which are likely to have a crucial impact on their success with the registrars. Aside from the question concerning the complexity of the contract, these parameters also include the complexity of the technical connection as well as the payment model selected. Even so, new registries will have to make considerable effort to draw the attention of the registrars with limited budgets. Many of the new registries are likely to take the scarcity of their shelf space as an opportunity to make the best of the situation and choose alternative distribution options. This may mean establishing their own registrar after the abolishment of the vertical separation, or collaborating with multipliers and using sales channels outside of the traditional domain name industry. Over the course of the next few years, this will probably result in a substantial change in the market environment and generate entirely new species of players previously unknown in the domain name industry. No matter what, however, with respect to the role of the registrars we must remember that as financial sources, they assume a key role when it comes to the chances of success of new extensions. In this context, we also want to refer to the answers to our question about the success which the providers expect regarding the different categories of the new extensions to be introduced.

Do you expect new TLDs to lead to a decline in the domain name registrations of the domestic ccTLDs?

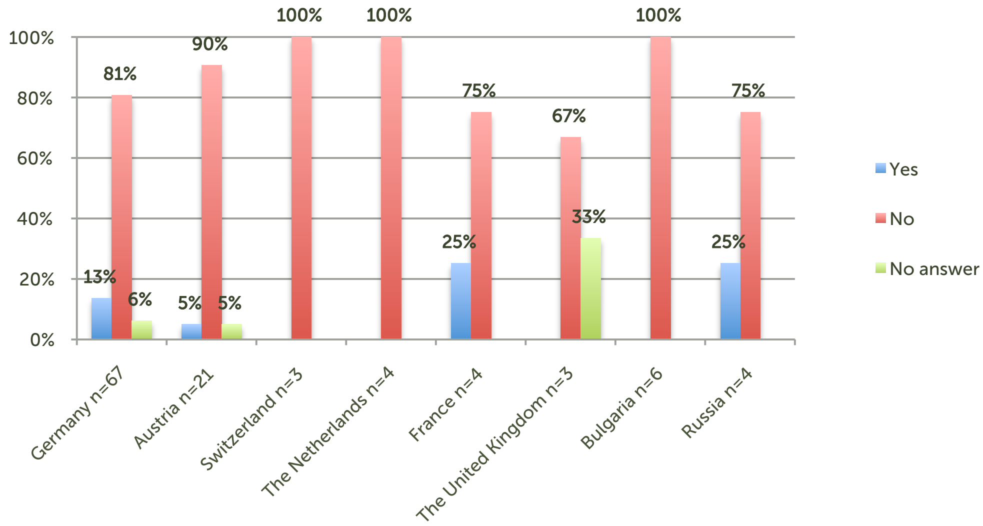


Fig. 65 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Operators of country extensions can (again) breathe a sigh of relief. The overwhelming number of survey participants stated that they do not expect new TLDs to result in a decline in the domain name registrations of the respective domestic ccTLDs. This result is nearly identical with the results of the studies of the previous years. The positive attitude towards the respective country extensions had already become apparent in a survey which eco conducted a few years ago. A large proportion of the companies surveyed indicated that they would be using new TLDs in addition to their existing registration under the respective country extension. It remains to be seen if this will remain so in the long run. Especially the geographical TLDs might also be perceived by users as genuine alternatives to the country extensions. However, whether and to what extent this will be the case, probably only time can tell. Due to the not always favourable lot numbers and the sometimes very late introduction of the respective TLDs as a result of this, statements about this can probably not yet be made in next year's Registrar Atlas.

Furthermore, we asked the survey participants if and which IDN scripts they were planning to add to their portfolio. It is noteworthy that the largest number of providers are not planning any expansion of their IDN offers. Only Cyrillic is supported to a relatively large extent, with the respective providers coming from Bulgaria and Russia, where support of Cyrillic is probably more or less obligatory rather than a voluntary extension of the product portfolio. This assumption is corroborated by the fact that no provider from Bulgaria and Russia intends to support additional IDN scripts. The otherwise highly constant percentage figures regarding the implementation of the IDN scripts suggests that we are looking at a few internationally operating "full-range providers" who must offer their customers all aspects of the domain name business. ICANN offers IDN TLDs special treatment in making their promotion a priority. It remains to be seen if this is actually going to boost the use of the offer or stimulate the generation of more attractive portfolios on the part of the registrars.

WHICH NEW IDN GTLDS SCRIPTS DO YOU PLAN TO ADD TO YOUR PORTFOLIO?
MULTIPLE ANSWERS POSSIBLE

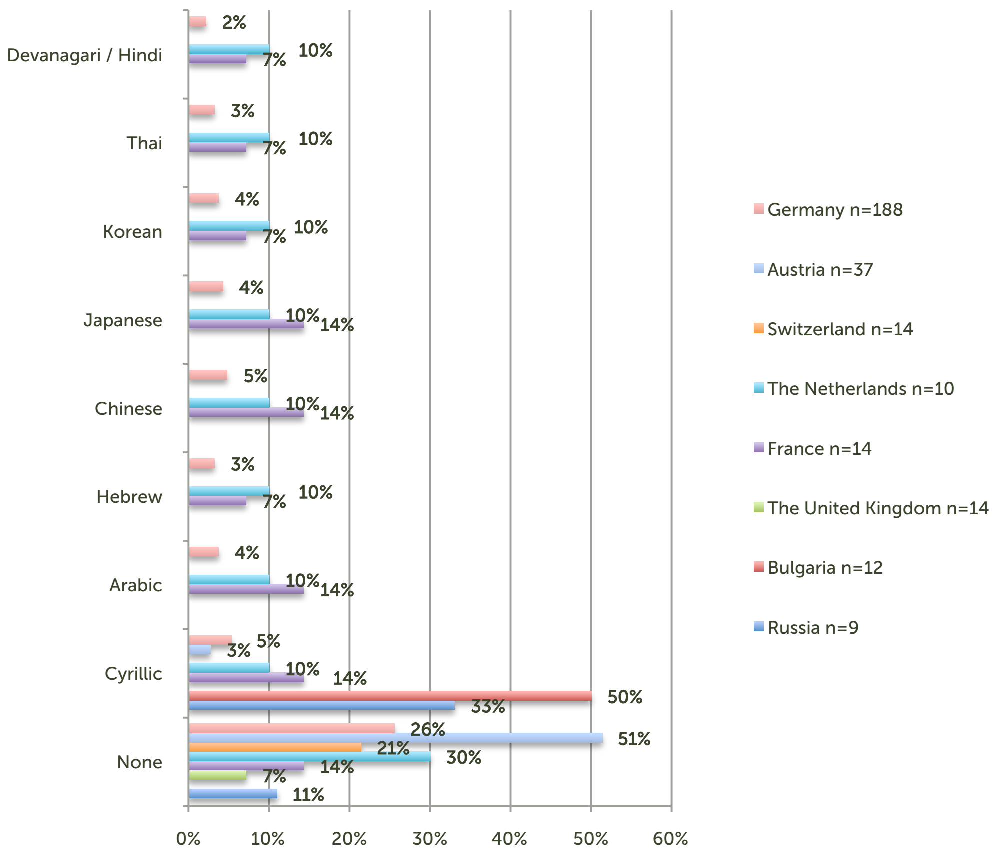


Fig. 66 | eco – Association of the German Internet Industry, Registrar Atlas 2013

Publication Details

Publisher

eco – Association of the German Internet Industry
Lichtstrasse 43h
50825 Cologne
Germany

Tel.: +49 (0) 221 / 70 00 48-0
Fax: +49 (0) 221 / 70 00 48-111

Contact person

RA Thomas Rickert, eco Director Names & Numbers
Tel.: +49 (0) 221 / 70 00 48-0
thomas.rickert@eco.de

Author

Thomas Rickert

Layout

Janett Schmidt