

The.nlyst

CROSS-BORDER GROWTH

Many Dutch businesses look beyond the borders of their own country. Especially in the internet industry. Arno Vis, CEO of Openprovider, and Sam Renkema, CEO of SpamExperts, talk to The.nlyst about the opportunities and challenges associated with doing business on an international basis.



Arno Vis, CEO Openprovider

How important is the international market for you?

Arno Vis: "We now manage about 650,000 domain names. By 2023, we aim to get that up to more than 25 million and establish ourselves as number two in the world. That implies growing faster than the market, which is only possible if we grow internationally."

Sam Renkema: "Ever since we started out, we have always had an international outlook, because spam has never been a local problem. At the moment, we are active in more than eighty countries. We are one of the world's top e-mail security providers. In 2014, we processed about sixty billion messages and protected more than four million companies against spam and virus mail."

Do you have offices outside the Netherlands?

Arno Vis: "We've had an office in Russia since 2008 and one in Spain since 2012. We are also planning a presence in India. We have customers all over the world, but we focus extra attention on the countries where we have offices. That mainly takes the form of sales and support. In Russia we have a fast-growing team of software developers as well."

Sam Renkema: "We employ people from all round the world, including Romania, Russia and Mexico. We found our first

software developer ten years ago in New Zealand, and he still works for us. We didn't have an office to begin with, but we found that managing a lot of people all working from home was very time consuming. Now we have a head office in Amsterdam and a branch office in Bucharest. Romania has proved to be an excellent location for us. The

country has a highly educated workforce, rates of pay are much lower than in the Netherlands and you can get there from Amsterdam's Schiphol Airport in a couple of hours. We are now looking at expanding into the US and Singapore."

How do you deal with international differences in the law and the systems?

Arno Vis: "That's an increasingly complex challenge. Every registry has its own policies and its own rules. Even within Europe. Some registries insist that the registrant or the registrar has a local presence, for example. How can it be a common market with requirements like that? We deal with the situation as we find it, but we don't like it. Through consultative forums and the like, we lobby registries to work together more and to harmonise their rules and processes. In Russia, new privacy legislation is coming in this year. Russian data will then have to be stored on Russian territory." ➔



Sam Renkema, CEO SpamExperts

1 abc	2 abc	3 def	*
4 ghi	5 jkl	6 mno	0
7 pqrs	8 tuvw	9 xyz	#

Foreword

At first sight, the .nl domain seems as Dutch as clogs and windmills. But the internet address extension for the Netherlands is in fact quite an international institution. After all, the internet is now a thoroughly global phenomenon. The .nl domain is used not only within our national borders, but also by Dutch companies focused on international markets, for example. And by non-Dutch companies that want to reach a Dutch audience. Every day, hundreds of thousands of e-mails with .nl addresses reach recipients in other countries. The .nl domain is one of the biggest country-code domains in the world and SIDN stands as an example to many other registries. SIDN personnel are active in various international consultative forums, working in fields such as global internet governance, security, technical standardisation, joint research and the exchange of knowledge.

In this edition of The.nlyst, you can read more about the importance of international markets for the Dutch internet industry. We have also been analysing our data to present a picture of just how international the modern .nl domain actually is. There are interviews with the CEOs of two Dutch companies that are active around the world and a piece featuring Job Witteman, who heads up the world's biggest internet exchange, AMS-IX. The.nlyst has also been talking to Stijn Grove about the recent trade mission to Canada, which included a delegation from the umbrella group Digital Infrastructure Netherlands (DINL). Because we wish to contribute to a strong internet industry in the Netherlands and to the competitiveness of Dutch businesses across Europe and beyond, SIDN is involved in many such initiatives.

I hope you enjoy this edition of The.nlyst and take inspiration from its contents.

Roelof Meijer,
CEO SIDN



- ⇒ The precise implications of that for us have yet to be clarified.”
Sam Renkema: “We are fortunate insofar as we supply the same product everywhere. Our customer base is very homogenous; an ISP in Morocco has just about the same needs as an ISP in the US. Legal differences are relevant to us only where our offices are concerned. From that viewpoint, opening an office in Bucharest was a bit of a nightmare. It took four months just to get a bank account!”

Which countries are easy to do business with, and which ones aren't?

Arno Vis: “Doing business in Russia can be very complicated, because the rules on payments and accounting are very different. Fortunately, our experience there gives us an advantage over a lot of other people who are interested in the Russian market – being a pioneer definitely has benefits. Although there's a certain amount of harmonisation within Europe, you only really notice it where VAT and the euro are concerned. It can be hard to establish what the best legal form is for a subsidiary in another country, for example. We seem to discuss that subject with our accountant in Spain every year. Every country has its own rules and customs. So, if you want to do business locally, you need to have a local presence and use local people. We work exclusively with local people.”

Sam Renkema: “The nature of our product and our target group makes things a little easier for us. Personal contact is very important for sales, though. Despite the fact that it's quite normal to speak English in the IT world, that doesn't go down well everywhere. In Germany, for example, you have to speak German. And in France we only had two customers for a long time, until we added a French-speaker to our sales team. Russia, Africa, the Americas, the Middle East: no problem at all. By contrast, China and Japan are very difficult.

SpamExperts

SpamExperts develops e-mail security solutions deployed in the cloud or on premises. Services include filtering incoming and outgoing e-mail, and e-mail archiving. The company works for web hosts, ISPs, telecom companies and IT resellers all over the world.

Openprovider

Does a registrar add value to a domain name? Openprovider doesn't think so. The company therefore enables customers to register domain names at cost price. The formula is similar to that used by the American discount store Costco, and Openprovider aims to use it to conquer the world.

Without a physical presence, it's impossible to make headway in those countries. However, doing business always brings challenges, wherever you are. In the end, it all comes down to having a good vision and strategy, and working hard to implement them.”

Is it important to travel, to go to the places where you do business?

Arno Vis: “I go to Spain about twelve times a year and to Russia three or four times. I feel it's important for me personally, because the visits give me energy and inspiration. It's also important for the people we work with in those countries, because face-to-face meetings give them more of a sense of being in touch with the organisation as a whole.”

Sam Renkema: “Travel is very important. Last year, I spent about half of my time abroad. The trips were needed to develop international relations and to build up and train our sales team. Now that the team's in place, hopefully I won't have to spend quite so much time on the move.”

Last month, there was a trade mission to Canada, organised by Digital Infrastructure Netherlands.

How important are missions like that for your businesses?

Arno Vis: “We took part in a trade mission once, to Barcelona. It was a very positive experience. If DINL is involved in further missions, we would definitely like to go along.”

Sam Renkema: “I think such trade missions are a good thing, but I'm not sure that we stand to gain from participation. I go abroad all the time, so taking an international approach is entirely normal for me anyway. I don't see any need to go on a joint mission.”



"WE ARE A COMPLETELY INTERNATIONAL OPERATION"

AMS-IX CEO Job Witteman talks about the world's biggest internet exchange

On Amsterdam's Frederiksplein, the offices previously occupied by Hyves (once seen as the Dutch Facebook) now house the Amsterdam Internet Exchange. Above the leafy square, Job Witteman took a little time out from the work that recently won him Computable's nomination as CEO of the Year to tell The.nlyst about the biggest internet exchange in the world.

The internet is made up of roughly fifty thousand autonomous IP networks. Each network has to be connected to the rest in order for them all to communicate with one another. There are various ways of realising the connections. One way is to buy 'transit services', i.e. contract an external service provider to link you to the other IP networks. Another option is for IP networks set up direct links with each other – an arrangement known as private peering. A third approach involves a number of parties getting together to exchange traffic: 'public peering'. The AMS-IX is one of the internet exchanges where that happens.

World's biggest

The advantage of an internet exchange is that a user can set up an interconnection with any other user. Exchanges also cut connection costs because the physical infrastructure is shared by all the users. There are about five hundred internet exchanges around the world, but AMS-IX has far more users than any of the others. So what's the secret of its success? "We're neutral, independent and non-commercial," says Job Witteman. "Our members are our only shareholders. Everything we do is in their interests."

Size matters

The bigger an internet exchange is, the more attractive it is to IP networks. "It's like a street or district in a city," explains Job Witteman. "If there are only one or two bars or restaurants, not many people will go there for a night out. But if there are thirty all close together, people will come flocking in." Does that mean that exchanges are automatically in competition

with each other? "There's a lot of overlap in our activities. What we do in Amsterdam, someone else is doing in London. We complement each other and act as backup for each other. In that respect, there is a lot of cooperation. At the same time, I want to deliver the best for our members and our clients. So, if there's a chance of getting another participant on board, I'll do all I can to make it happen."



Job Witteman,
CEO AMS-IX

Getting smaller players involved

Connecting to AMS-IX isn't a realistic proposition for every IP network. "To benefit from connection to the exchange, you need to be geographically close," Job Witteman stresses. "Big players, such as Google and Amazon, therefore establish a presence in Amsterdam. That's not really an option for a small IP network from France or Italy." In order to nevertheless provide a service to the smaller players, AMS-IX has established a reseller network. By buying capacity from a reseller, even relatively small-scale operators have access to AMS-IX.

Economic driver

AMS-IX attracts foreign businesses to Amsterdam. No less than 80 per cent of the exchange's members are from outside the Netherlands. AMS-IX is therefore a significant driver of the ↻



⊕ Dutch economy. Does that influence policy at AMS-IX? "It's a pleasing side-effect," acknowledges Job Witteman, "but nothing more. It's a great honour to be included in the Canon of Amsterdam and obviously I'm really pleased that the mayor uses us to promote the city, but everything we do, we do in the interests of our members. We are a completely international operation. We aren't here for the benefit of the Netherlands."

Branches in other countries

In recent years, AMS-IX has opened several branch exchanges in other countries. First in Curaçao, then later in Hong Kong, Mombasa and three US cities. The locations weren't chosen for financial reasons, Job Witteman points out. "The siting of the branch exchanges is purely demand-driven. We look at setting up an exchange in a particular place only if our clients ask us to." The AMS-IX policy, with independence and client engagement to the fore, appears to work extremely well. At the moment, there are more than forty users connected to the American exchanges. By the end of this year, the aim is to have a hundred.

Success elusive in Africa

By contrast, the internet exchange set up in Mombasa, Kenya, never really took off. AMS-IX therefore pulled the plug on the project in June. "The main problem was the bandwidth prices," Job Witteman reflects. "There was a real desire to make things work, but not as many international players joined the exchange as we had hoped. As a result, exchange users from the region didn't get the cost savings they were looking for. The security situation didn't help, either. It's a great shame that we couldn't pull it off, because an exchange would have contributed to the internet's development in Africa."

Roots in Amsterdam

However international AMS-IX may be, everything is run from Amsterdam. Job Witteman: "We have nearly fifty people working here. Most things are controlled remotely. Because the architecture is very robust, with a high level of redundancy, we don't need people on site to carry out repairs. Instead, we have maintenance agreements with the data centres where we have a presence. We have just two employees abroad, and they are not technical personnel. Their role mainly involves personal contact with exchange users."

AMS-IX

6 internet exchanges

4 countries

47 employees

16 nationalities

Almost 4 Terabits per second at peak times



Government role increasingly important

AMS-IX seeks to maintain as much operational independence as possible. Contact with the government is nevertheless increasingly important. "Nowadays, if there is an issue with our services, it's not long before we have someone from the ministry on the phone enquiring about the situation," says Job Witteman. "A few years ago, therefore, we appointed a Public Affairs Officer. We've also been involved with setting up Digital Infrastructure Netherlands (DINL). It's a useful platform for dialogue amongst companies active in the internet industry; it gives us all the opportunity to learn from each other about relations with the government, for example. That's becoming more important all the time, e.g. in connection with issues such as the interception of communications."

Personal contact

The recent Dutch trade mission to Canada was not particularly significant for AMS-IX. As Job Witteman points out, "Our target group is very specific. We can communicate with them better at events such as RIPE meetings or our own MORE-IP event. We also travel a lot. I myself have been to the United States four times already this year, for example. Even in the internet world, personal contact is important. You need to show your face, get a sense of what's happening locally. It's only by sitting down to talk to people that you find out what's really going on."



DIGITAL INFRASTRUCTURE NETHERLANDS ON TRADE MISSION TO CANADA

A trade mission from the Netherlands spent the period 26 May to 4 June visiting the Canadian cities of Toronto and Vancouver. Digital Infrastructure Netherlands was part of the delegation – the first time that the umbrella group had been involved in such a mission. DINL board member Stijn Grove talks about the trip.

How did DINL come to be involved in the trade mission to Canada?

“We have been working on an international agenda for some time. We were aware that, in various other countries, organisations like ours regularly take part in missions, so in that respect the Netherlands was a little behind the times. From now on, we’d like to do several missions a year. On this occasion, we were invited to take part at the last minute, but of course we didn’t hesitate to accept.”

Why was the mission important?

“It’s important that we promote the sector. In the Netherlands, we have a trend-setting digital industry, and that translates into strong growth figures. Some firms are growing so quickly that further expansion in the Netherlands is very difficult. So they need to look abroad. And Canada is a particularly attractive market for Dutch companies. A recent study found that a lot of Dutch companies are looking for opportunities in Canada and the US. It’s easy to see why: most Dutch people have quite a good command of English, Canada and the US are big markets, and in some fields we are miles ahead in the Netherlands. In Canada, for example, it’s not unusual to pay 200 dollars for a 3MB line and internet banking is almost unheard of. You just can’t imagine that kind of situation in the Netherlands any more.”

What was your aim at the start of the mission?

“We had three aims. The first was to highlight the importance of the digital infrastructure. The industry that we represent is one of our country’s biggest growth sectors, but not many people realise just how important it is to the economy. Taking part in the mission was valuable in terms of building a strong

network within the Netherlands. Second, we wanted to assess the opportunities that exist for Dutch businesses in Canada. We spoke to people from data centres and umbrella groups; we visited universities and so on. You can think of it as preparing the way for companies that want to do business in Canada. Finally, we were hoping to persuade the Canadian business community of the benefits of coming to the Netherlands. With that aim in mind, we held several ‘matchmaking sessions’ with Canadian companies.”



Stijn Grove, DINL board member and director of Dutch Datacenter Association

Does a trade mission of this kind require a lot of preparation?

“Yes. In total, there were about sixty people in the delegation. Our party was eight strong: two of us from DINL and people from six affiliated companies. Advance meetings were held with all the delegates. What are you looking for... what do you want to achieve... where are the opportunities? A programme was then put together that supported everyone’s aims. So, while you’re on the mission, the activities are all very focused. Nevertheless, ad hoc meetings are sometimes arranged as you go along.”

You had a very busy programme. How do you cope?

“Going on a trade mission like the one to Canada is very tiring. Your whole day is planned, from early morning till late ☺



⌚ at night. But you know that before you go, so you are ready for it. The key to getting through it is remembering to enjoy it all. Things are much easier when you're enjoying yourself."

What went well and what could have been better?

"There wasn't much time to prepare, but I think that the mission was very successful. We were able to make some good contacts, including Minister Ploumen. We talked to a lot of people and visited a lot of companies. Although no definite deals came out of it, a number of follow-up meetings were arranged. Ultimately, the success of the mission will depend on how it's followed up."

Did each grouping within the delegation operate independently, or did you do things together?

"We got on well with the people from the agricultural industry. They have been taking part in similar missions for a long time and they are very professional. It was good to see how they made use of former politicians, for example. The contact

between us and their veterans was very good. They were also very interested in our sector. On the plane, for example, I was sitting next to a paprika grower. It turned out that he had two server arrays and was wondering whether he couldn't transfer some of the load to a data centre. It brought home just how much all industries in the Netherlands depend on our digital infrastructure."

Another trade mission is planned for the end of July, this time to the United States. Will that follow a similar pattern?

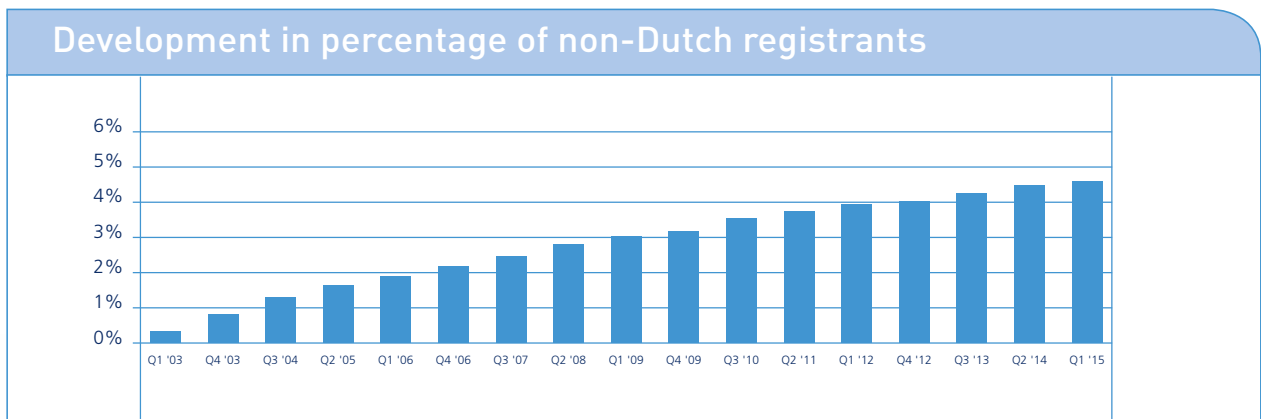
"No, the trade mission to the US is much more targeted. We will begin by going to San Diego for HostingCon, the biggest hosting fair in the US. We have a joint programme arranged with the consulate and will be running a Little Holland stand at the fair. After the fair, we move to Silicon Valley midweek. The second half of the trip will then be more like a normal trade mission, with a visit to Stanford University and match-making sessions, for example."

THE INTERNATIONAL DEVELOPMENT OF .NL

Open (virtual) borders

The .nl domain opened its virtual borders relatively early – in 2003. Since then, any organisation or private individual anywhere in the world has been able to apply for a .nl domain name. When registering a name, however, an applicant had to

provide a contact address in the Netherlands ('domicile address'). In many cases, registrants from other countries would choose to use the address of their registrar as their domicile address in the Netherlands. That was sometimes problematic when both the registrant and the registrar were



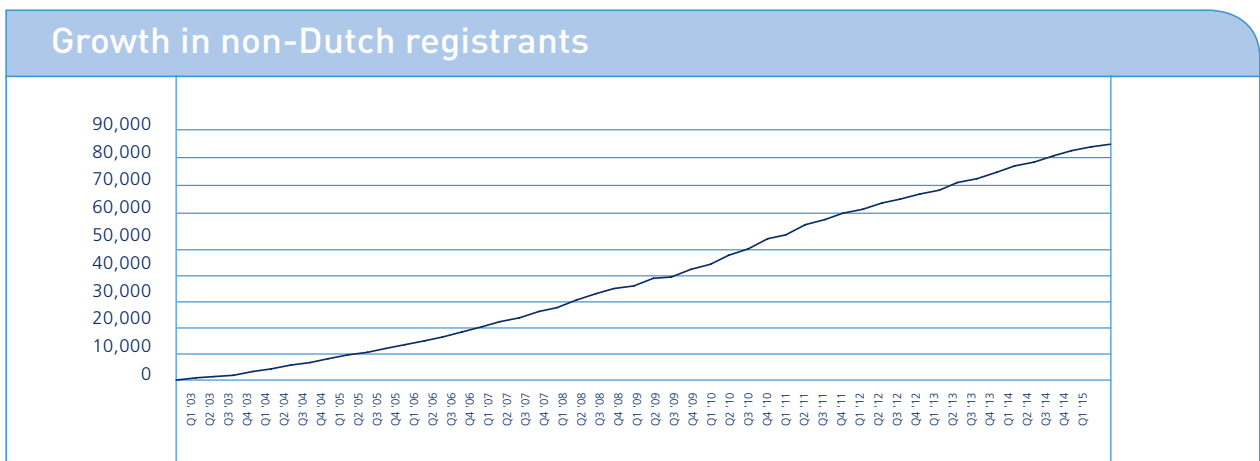
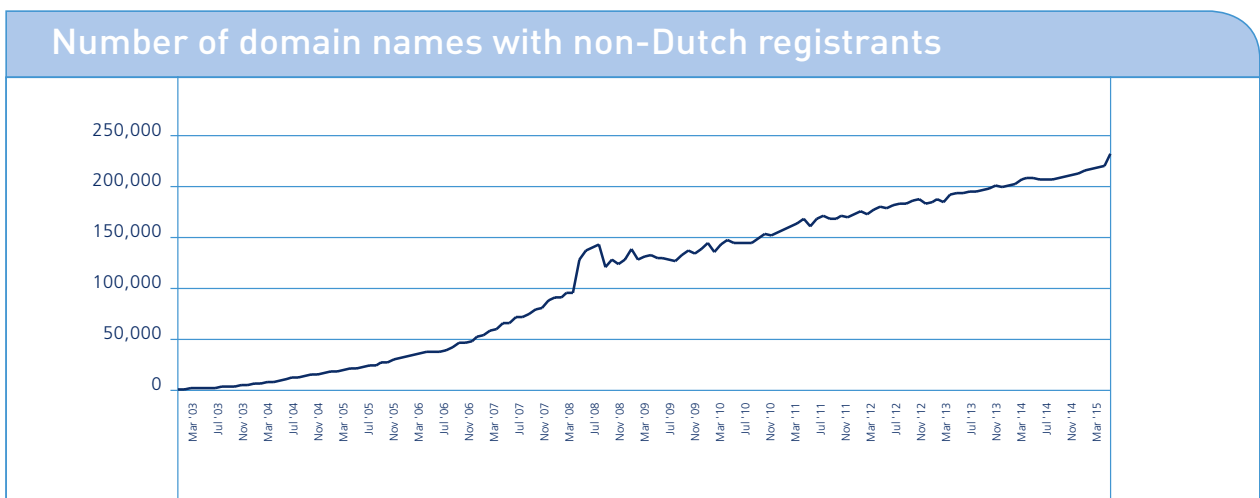
↻ based elsewhere. Since the end of 2009, therefore, registrants based outside the Netherlands have been able to use SIDN's address as their domicile address. As a result, there are no longer any significant obstacles to the registration of .nl domain names by non-Dutch registrants.

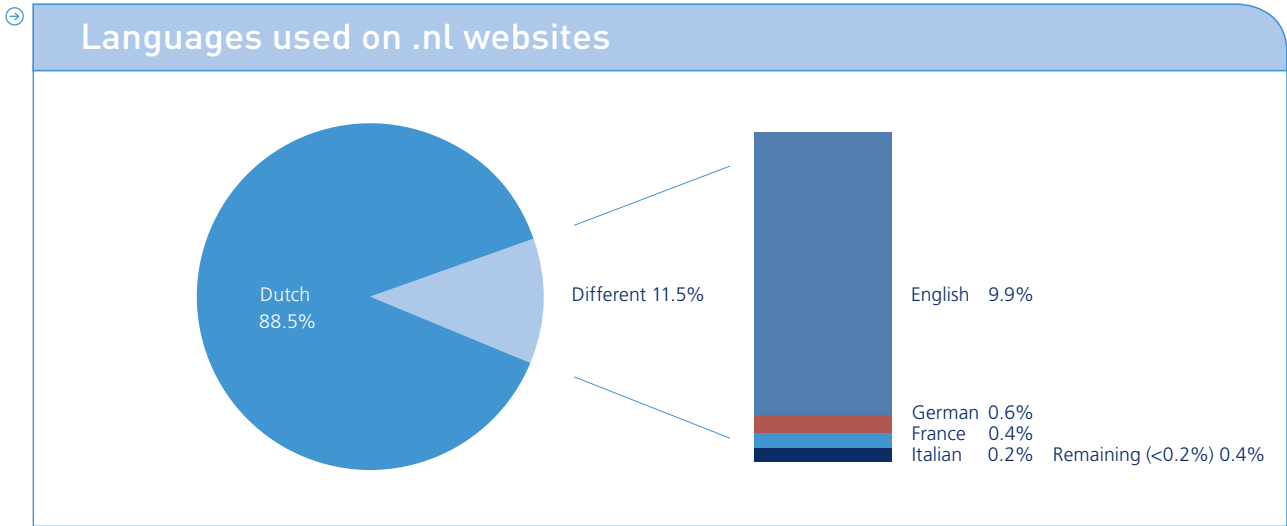
Non-Dutch registrants

There are currently about 90,000 non-Dutch registrants. Their number continues to exhibit almost linear growth, which is interesting, given that growth in the number of local registrants has plateaued. At the moment, about 4.5 per cent of all .nl registrants are based in other countries.

Domain names held by non-Dutch registrants

Out of the total of just over 5.5 million .nl domain names, roughly 220,000 (about 4 per cent) are held by non-Dutch registrants. Now that growth of the .nl domain has plateaued, growth in the number of domain names with non-Dutch registrants is strong in relative terms. The historical growth pattern is somewhat erratic, however, with considerable peaks and troughs in recent years. A particularly pronounced peak occurred in the summer of 2008, when a single non-Dutch party registered almost fifty thousand .nl domain names in a short space of time. About half of them were cancelled after about three months.





Languages used on .nl websites

Given the large number of .nl domain names held by non-Dutch registrants, it is no surprise that .nl is a multilingual domain. Naturally, as the graph shows, the great majority of .nl websites are in Dutch. It should be noted, however, that roughly half of the 5.5 million .nl domain names are not included in the data presented. In most cases, that is either because the name is not associated with a website, or because the website has too little text to reliably ascertain what language is used.

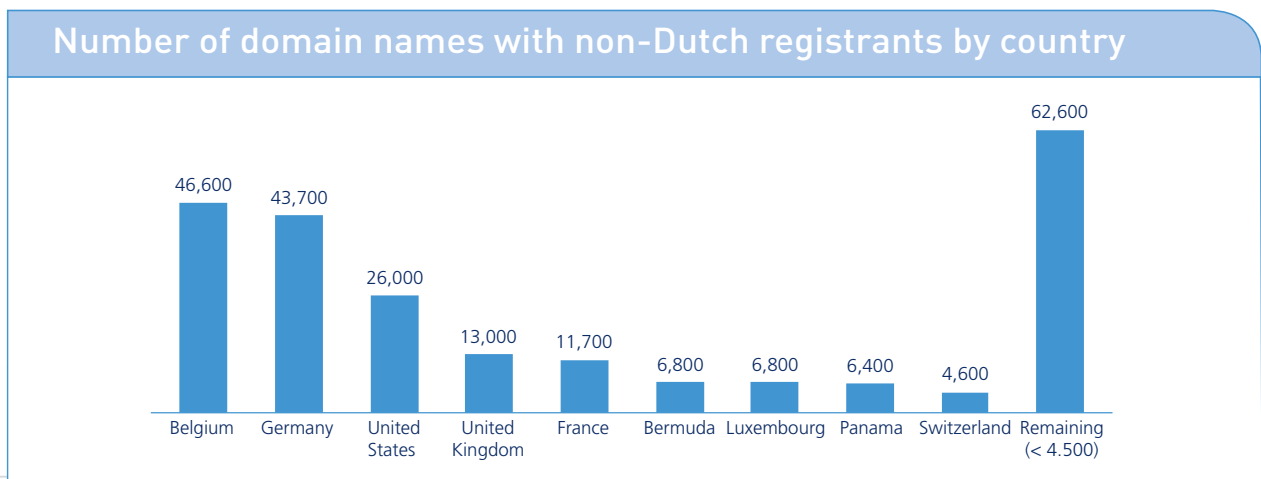
Use by non-Dutch registrants

Domain names with non-Dutch registrants appear to be used in much the same way as names with local registrants. Most domain names are used for websites and the content on those

sites is mainly in the Dutch language. Broadly speaking, non-Dutch registrations can be divided into two groups:

- Registrations from neighbouring countries, such as Belgium, Germany and the UK, which account for about half of all non-Dutch registrations
- Registrations from the USA and tax havens, such as Bermuda, Luxembourg and Panama, which account for about 20%

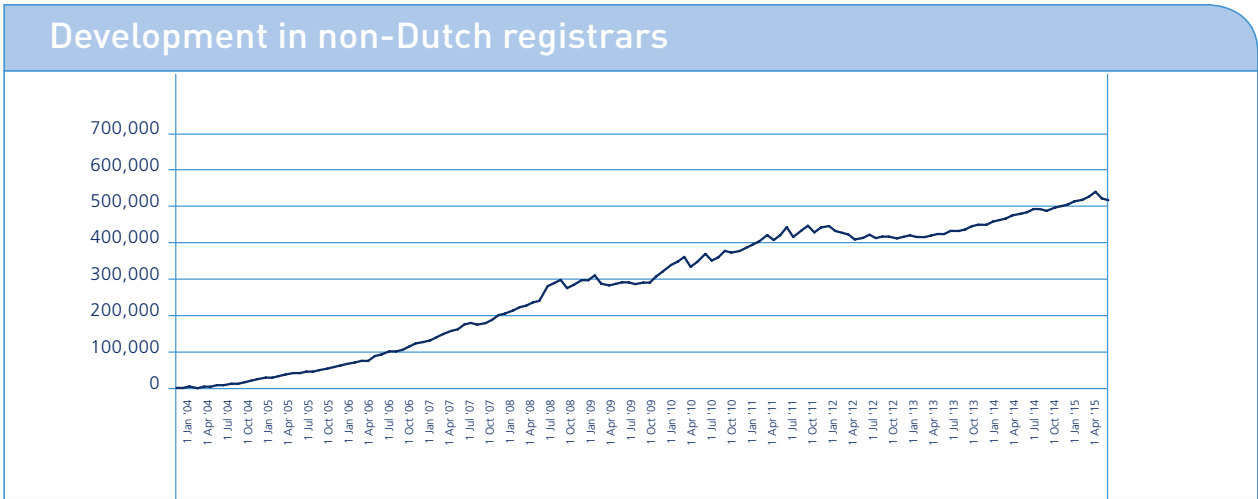
Many of the .nl domain names with registrants in neighbouring countries are used for websites aimed at Dutch audiences. By contrast, the .nl registrations with more remote holders tend to be linked to domainers: people and firms that specialise in trading domain names. The peak in the summer of 2008 and this year's growth appear to be attributable mainly to the activities of domainers.



➔ Registrars

Dutch registrars are very outward looking. Many of them have reached the limits of their growth within the Netherlands and are therefore turning their attention abroad. All the biggest Dutch registrars are active in Belgium, for example. A number are even active in the registrars' forum linked to DNSBelgium, the Belgian registry. Conversely, many non-Dutch registrars

are active on the Dutch market. Indeed, one of the biggest registrars operating here is a non-Dutch company. In total, about half a million .nl domain names are managed by non-Dutch registrars. That is five times as many as ten years ago – well ahead of growth in the overall number of .nl domain names.



.NL Analysed

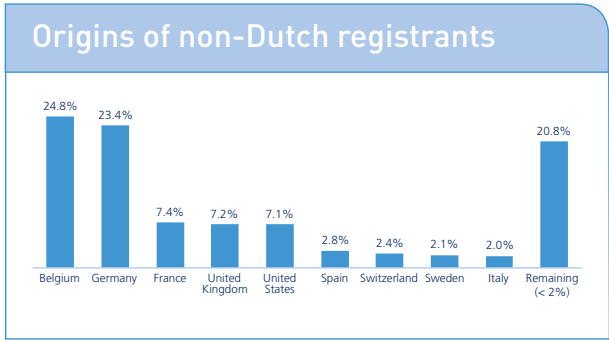
#	TLD		Count Q1	Growth	
1	.com	Generic	116,920,329	1.4%	=
2	.de	Germany	15,885,988	0.5%	=
3	.net	Generic	14,992,107	-0.1%	=
4	.cn	China	11,678,026	5.3%	=
5	.uk *	United Kingdom	10,586,358	0.6%	=
6	.org	Generic	10,535,062	0.6%	=
7	.nl	Netherlands	5,556,691	0.5%	=
8	.info	Generic	5,349,441	-2.0%	=
9	.ru	Russia	4,897,083	0.6%	=
10	.eu	European Union	3,868,551	-0.9%	=
11	.br	Brasil	3,568,492	1.6%	=
12	.ar *	Argentina	3,050,000	0.9%	=
13	.au	Australia	2,963,715	1.4%	=

#	TLD		Count Q1	Growth	
14	.fr	France	2,879,554	0.9%	=
15	.it	Italy	2,808,074	2.0%	=
16	.pl	Poland	2,538,621	0.6%	=
17	.ca*	Canada	2,365,000	2.2%	↑
18	.biz	Generic	2,296,198	-3.1%	↓
19	.ch	Switzerland	1,939,115	0.5%	=
20	.in*	India	1,925,000	2.2%	=
21	.co*	Colombia	1,803,000	1.7%	=
22	.es	Spain	1,770,653	0.9%	↑
23	.us	United States	1,742,984	-1.0%	↓
24	.be	België	1,504,823	0.9%	=
25	.jp	Japan	1,389,321	0.1%	=
* estimate					





The .tk domain has stopped publishing statistics. Because of the domain's size (the last published figure was more than 28 million domain names), the impact on the global statistics is considerable. In the absence of up-to-date data, .tk will no longer be included in the figures we publish.



Top 25 TLDs

At the global level, growth in the number of domain names was remarkably strong, following four quarters of sluggish growth. In the first quarter, the total number of domain names increased by 3.7 million to about 264 million. However, a number of large legacy TLDs (.net, .biz and .info) contracted for the third quarter running. Although their decline can't be attributed directly to the launch of the new gTLDs, it is likely to have had a significant effect. In the last quarter, more than 150 new TLDs came on line, bringing the total number of new TLDs to 579.

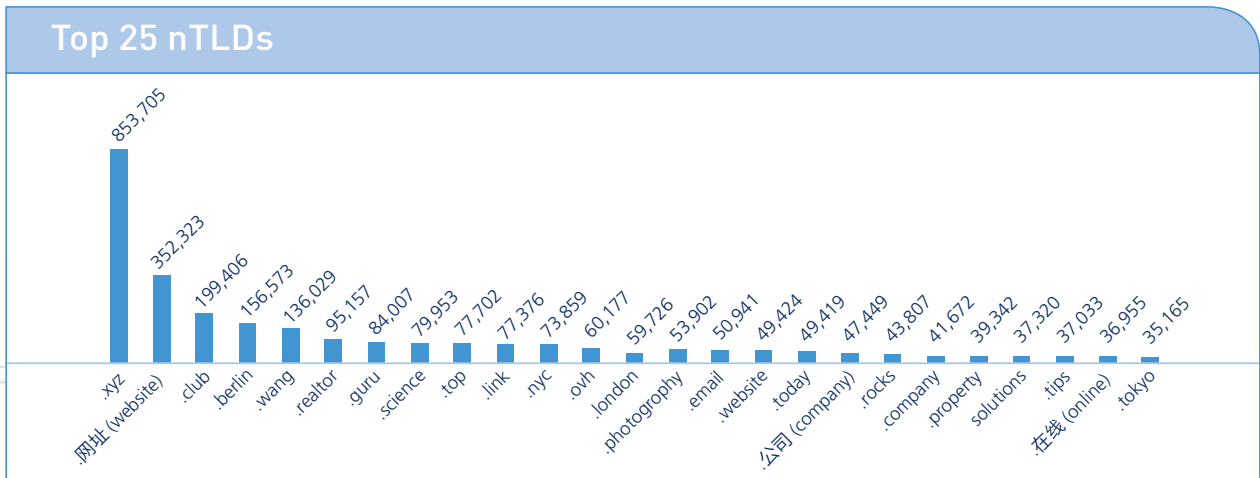
By the end of the first quarter, there was a combined total of 4.3 million domain names registered under the new gTLDs. That figure is up 880,000 on Q4 2014. Nevertheless, the growth of the new gTLDs was less than in the previous three quarters, when it had averaged about a million. The slowdown was mainly due to reduced expansion of the .xyz domain (50 per cent less than the previous quarter) and the fact that the first batch of renewals fell due in various TLDs. One of the major new registry operators, Donuts, has published the renewal ratios for a number of its TLDs, which range from 54.7 per cent to 71.7 per cent. By way of com-

Who's behind our statistics?

All the statistics on the .nl domain that appear in The.nlyst are compiled by Sean Schuurman van Rouwendal, SIDN's Business Intelligence Analyst. Sean provides the SIDN management, registrars and other stakeholders with relevant information about the .nl domain on a day-to-day basis.



parison, the average renewal ratio for .com and .net is roughly 72 per cent. The early signs are not particularly encouraging for the new TLDs, therefore.



New Key Account Manager

On 1 August, Sebastiaan Assink succeeds Daniel Federer as Key Account Manager at SIDN. Until recently, Sebastiaan was General Manager at the .nl registrar Oxilion. He was also an active figure on the Technical Committee of the Registrars' Association. His background means that he is well equipped



to help us continue building strong relations with our key accounts. From 1 August, you can reach Sebastiaan by mailing sebastiaan.assink@sidn.nl.

Daniel Federer remains at SIDN, where he has taken on the role of Business Developer.

Save the date

On 26 November, we are holding a restyled Contact Day for .nl registrars at Galgenwaard Stadium, Utrecht. There will be various inspiring speakers and the day represents an ideal opportunity to meet other .nl registrars. So put the date in your diary, or register to attend now at sidn.nl/relatiedag.

Event calendar

SIDN sends representatives to many national and international events. We regard attending events as one of our responsibilities as the registry for the .nl domain. In addition, we regularly organise conferences ourselves. In the coming months, SIDN plans to be represented at the following events:

Date	Event	Venue
19 - 24 July	IETF 93	Prague, Czech Republic
10 Sep	36th CENTR Administrative workshop	Cagliari, Italy
24 - 25 Sep	48th CENTR Legal & Regulatory workshop	Belgrade, Serbia

Suggestions

If there is a topic that you think we should be covering in The.nlyst, please send your suggestions to: communicatie@sidn.nl.

Warning

In recent weeks, many registrants have been receiving e-mail messages with 'Domeinnaam.nl updaten' ('Update domainname.nl') in the subject line. The messages ask recipients to log in using their website account details in order to keep their domain names.

These e-mails are NOT from SIDN and, if you receive one, we urge you in the strongest terms not to do as the message asks. Please report any such phishing incident to fraudehulpdesk.nl

Colophon

The.nlyst is published by SIDN, the company behind .nl. The magazine provides information about internet-related themes and about (.nl) domain names in particular. The .nlyst is distributed free of charge to SIDN's registrars and other stakeholders.

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