



Strategy

Strategy 2026-2028



Introduction



The world around us is constantly changing: geopolitical tensions, new patterns of internet use, changing stakeholder expectations and the reduced growth of .nl are just a few examples. Meanwhile, a smooth-running internet is becoming ever more important to Dutch society and the Dutch economy. Against that backdrop, we have reviewed the breadth of our activities and how we can continue to deliver added value.

In the Netherlands and across Europe, there is growing awareness of just how important it is to have a stable digital infrastructure. Until a few years ago, the Dutch government and the European Commission were focused mainly on minimising risk and fighting cybercrime. Less attention was given to the opportunities provided by digitisation. However, rising geopolitical tensions and growing uncertainty about international relations have shifted the spotlight to our strong dependence on other countries and foreign corporations. Strategic digital autonomy for the Netherlands and the EU have quickly moved towards the top of the agenda. In that context, it is not only the digital infrastructure itself that matters, but also the technologies and services based upon it.

Dutch society and the Dutch economy are highly reliant on a smooth-running .nl domain. SIDN is now formally designated an essential service provider and part of the nation's vital infrastructure. As such, we are subject to government supervision, we are required to meet strict security requirements, and the choices we make – particularly our technical choices – must be consistent with national security.

SIDN and its environment



Developments in the DNS and beyond

Since 2013, hundreds of new gTLDs have been introduced, of which only a few have been genuinely successful in terms of registrations or usage.

The use of such domains in the Netherlands has been limited. It's unlikely that a fresh round of new gTLD introductions in 2026 will have a substantially different outcome. Meanwhile, AI has been developing with remarkable rapidity. Tools such as ChatGPT, Copilot and DeepSeek are influencing how we use the internet, search engines and domain names.

So far, there has been no clear evidence of a negative effect on domain names, even though they feature less prominently in search results. Since 2024, the hype surrounding Web3.o (blockchain) TLDs has been waning. With Web3.o TLDs increasingly looking to integrate with DNS TLDs, we are inclined to regard them as more of an opportunity than a threat.

Although the internet provides countless opportunities, it does have its downsides. First, there is the digital divide: a declining but nevertheless large proportion of the world's population still has little or no access to the internet. That is even the case in the Netherlands and other western countries, albeit to a lesser extent. Furthermore, the internet is increasingly abused for cybercrime, disinformation, polarisation and political interference. State actors now frequently use the internet as a weapon, see it as a target and exploit it as a vehicle for the exercise of power.

Contraction of the domain name market and .nl

In the last few years, the domain name market in the Netherlands has stabilised and, since 2024, even contracted slightly. With a share of 66 per cent, .nl remains the domain name market leader, followed by .com. There are currently 6.1 million .nl domains, of which a considerable proportion are not in active use. For the first time in history, the .nl zone has contracted for 4 consecutive quarters.

Greater focus on core activities



Developing circumstances

The expectation is that .nl will experience no significant growth in the next few years, and may even continue to contract slightly. If nothing is done, therefore, a point will come when our expenditure, driven up by wage costs and price rises, exceeds our earnings. In other words, our circumstances are not what they were in, for example, 2011 and 2014, when we established SIDN Labs and SIDN Fund. Taken in combination with other developments, our changing circumstances also compel us to look critically at our strategic direction and the way we use our resources. Against that background, we intend to maintain and, where possible, increase investment in our core activities, while reducing investment in non-core activities and fixing it as a percentage of our income from .nl registration services.

Investment and its relationship to our core activities

Our investments in the internet community are divided into 3 types, on the basis of their relationship to our core activities:

‘Core’: development of products and services that we use ourselves and are necessary for our core activities

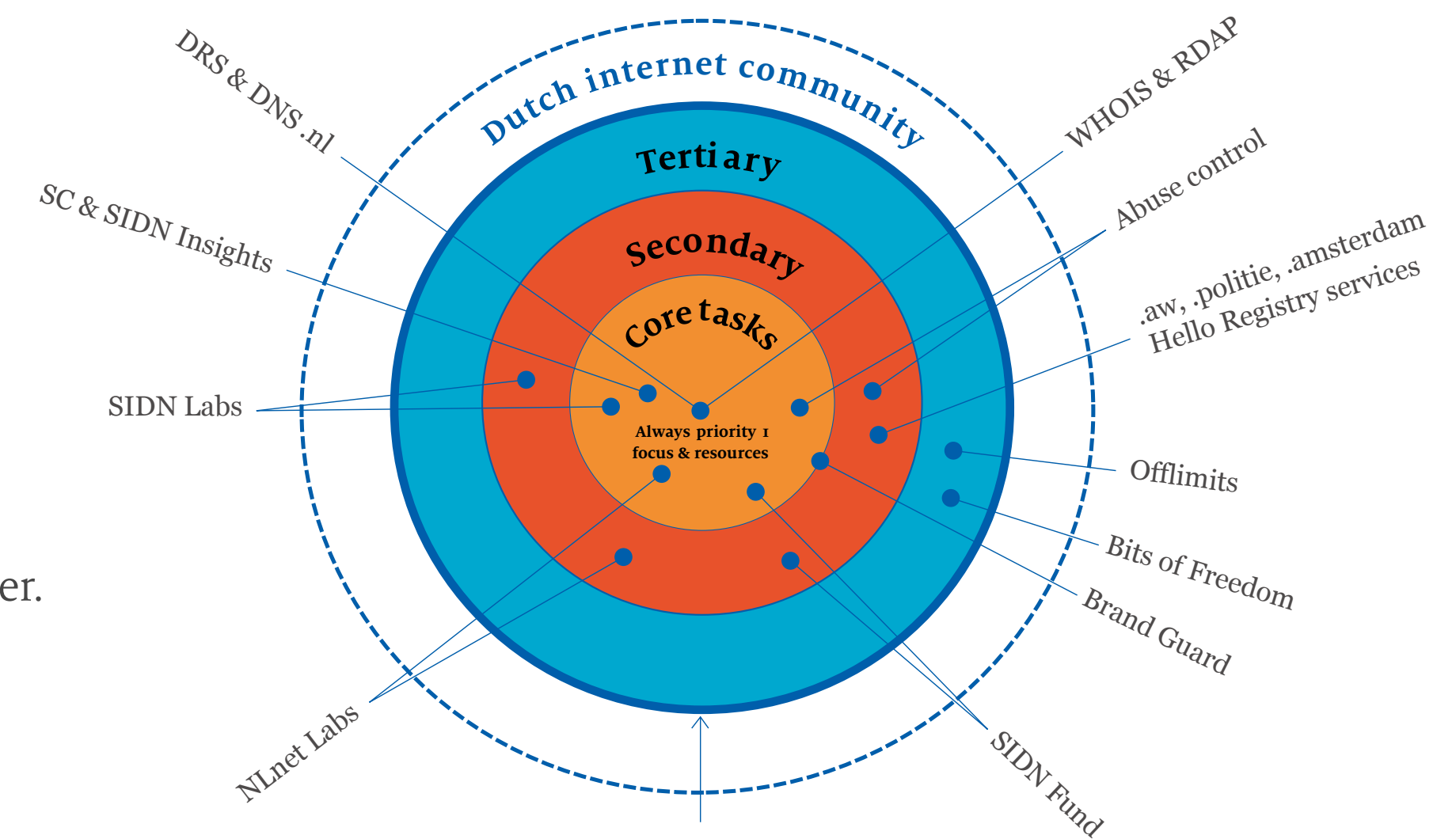
Development may be by SIDN Labs, may involve a project supported by SIDN Fund, or may be realised by a third party. In some cases, SIDN will be the only user, but the products and services in question will often be open-source and will usually be usable by other members of the internet community.

‘Secondary’: research and the development of products and services that relate directly to our core activities, but are not necessary for them

Development by SIDN Labs, with support from SIDN Fund or another body. We may or may not be the only user.

‘Tertiary’: research and (the development of) products and services that do not relate directly to our core activities and are optional

We are ending tertiary investment via both SIDN Labs and SIDN Fund. Through MVO, we will, however, continue to provide certain organisations and initiatives with financial support directly from SIDN.



Our mission:

A strong **.nl** for a connected **Netherlands**

- A strong .nl: we are primarily committed to an open, secure and resilient .nl that is safe to use and provides opportunities for all.
- A connected Netherlands: a strong .nl promotes not only connectedness amongst Dutch people and Dutch organisations, but also the nation's connectedness to the rest of the world.

Our payoff:



For confidence online with **.nl**

Our 3 strategic themes

- 1 A strong .nl
- 2 An effective and flexible SIDN organisation
- 3 An open, secure and resilient internet

A strong .nl is and will remain the internet domain for the Netherlands



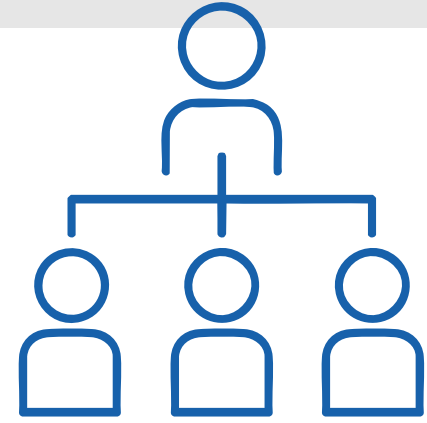
We aim to continuously excel in our core task with the .nl domain, which is a global leader in terms of security, stability, reliability, quality and independence. We serve our customers (domain name registrants and registrars), Dutch internet users and wider Dutch society by providing a top-level domain that stands as a product leader within our industry. By ensuring that the .nl domain is one of the world's most secure, innovative, resilient and reliable domains, we contribute to the Netherlands' connectedness, in every sense of the word.

We adhere to the following principles:

- .nl is the internet domain of and for the Netherlands. We are and will remain based in the Netherlands and subject to Dutch law. We involve stakeholders in our strategy, for example, and we take proper account of their interests while also maintaining our independence. Our issuance policy is fair, and whenever changes to it are considered, we involve the Dutch internet community in our decision-making.
- We use the latest proven technologies and top-class systems for domain name registration and resolving, and other related services. The availability, integrity and confidentiality of our .nl services and data are absolute priorities, in keeping with our status as an essential service provider. We also provide additional services that help to assure the quality and security of .nl and promote the use of secure, open standards and open-sourcing.

- With prices that are responsible and competitive within our industry, we keep .nl accessible to all. We aim to ensure that our core activities yield a responsible surplus, which we invest in the internet community in ways that generate opportunities, increase security, combat abuse and reinforce the internet infrastructure. A smaller portion of that surplus is used to maintain our contingency buffer.
- We believe that we share responsibility for fighting the unlawful and criminal use of .nl for purposes such as phishing, malware distribution and the dissemination of unlawful and criminal content. Our preference is to discharge that responsibility by means of collaboration with our sector and trusted notifiers. We intervene where it's necessary and responsible to do so and we are able to do so. Our intervention activities are guided by the principles of proportionality and subsidiarity. We account for and are accountable for those activities.
- We actively promote the use of .nl domain names and pursue sustainable growth. The added value of .nl for the Netherlands is what drives us; we do not seek to maximise the sale of .nl domains in order to generate income or improve margins.
- Because we wish to help make our sector even stronger, and because we believe that an innovative, open, accessible, diverse and secure internet contributes to a better world for everyone, we share our knowledge and collaborate with our peers and with public and private sector organisations in the Netherlands, Europe and beyond.

An effective and flexible SIDN organisation



In an era of rapid social, geopolitical and technological development, with SIDN's market under stress, it's vital that SIDN constantly strives to become an ever more resilient, agile and future-proof registry organisation.

That requires more than technical excellence; it also requires a strategic approach to the deployment and development of our people, our financial resilience and our operational efficiency.

In that context, we have 3 main focuses:

Investing in people

The expertise of our personnel is the foundation on which our service quality stands. In order to continue playing a lead role in an increasingly complex landscape, SIDN has to be, and to remain, an attractive employer for talented people. That implies:

- Ongoing, targeted investment in the development of knowledge and new competences
- A focus on long-term employability and staff satisfaction
- Competitive, future-proof compensation and benefit packages
- An inclusive, inspiring working environment with a culture of knowledge-sharing

Remaining financially resilient

Falling income and rising costs oblige us to look critically at our financial housekeeping and processes. We must:

- Use our resources strategically, taking both short-term and long-term considerations into account
- Achieve cost-savings where possible, without compromising our societal role or our service quality

Anticipating changes ahead

An effective and agile SIDN organisation also implies proactive adaptation to opportunities and external threats. By means of scenario-thinking, risk management and agility, we can quickly adjust course while continuing to fulfil our societal responsibilities.

An open, secure and resilient internet



A strong .nl domain is aided by an open, secure and stable internet, in the Netherlands, in Europe and beyond. Because both the current generation and future generations rely on the internet, we work to make the digital infrastructure as reliable and future-proof as possible. We do that in various ways: by using expertise and resources, by conducting applied technical research, and by providing high-quality registry services, mainly for country-code top-level domains (ccTLDs), but also for brand TLDs and geoTLDs.

Use of expertise and resources

We use our expertise with and data on internet core systems, internet security, the domain name market and internet governance for collaboration with governmental bodies in the Netherlands and with other internet infrastructure operators. For example, we play a liaison role for the NCSC and we undertake work for the Dutch Anti-DDoS Coalition. On the international stage, we also contribute to internet governance, protection of the multistakeholder model, the development of open standards and protocols, and assurance of the internet's security and technical stability through organisations such as the IETF, RIPE, ICANN, DNS-OARC, CENTR and IGF. Finally, through SIDN Fund, we support initiatives that contribute to a strong and open internet infrastructure, and we co-fund internet.nl.

Applied technical research

Our research centre SIDN Labs is at the heart of our applied technical research activities. The team undertakes such research to make .nl and the wider internet infrastructure more secure and resilient. That goal is pursued through large-

scale measurements and analyses, by designing, prototyping and evaluating new technologies, and by applying scientific insights in practice. The team's focus fields are domain name security, the security of core systems (DNS, BGP, NTP) and emerging internet technologies. As well as being used to improve SIDN's own services, the team's research results are shared with the internet community and the academic community. Close collaboration with universities and other research centres is central to our work.

Registry services

In partnership with CIRA, we provide high-end registry services, mainly for ccTLDs, but also for geoTLDs and brand TLDs. By doing so, we help to increase the security, resilience and quality of the internet, while also reducing costs for ourselves and the other registries concerned. Collaboration, knowledge-sharing and impact maximisation are central to those activities. Income from our work as a registry service provider is used to continue developing the platform and investing in our services and in the quality of the internet – yielding benefits for .nl registrars and Dutch internet users.

Such activities form a bridge between our operational work on the one hand, and the world of research and technology on the other. As well as providing reliable services, we help to propel the internet community forward and to further increase the Netherlands' digital strength.



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