

# The hotspot for **Cyber Security**, 10 reasons why



The Rotterdam The Hague metropolitan region is the ideal gateway to Europe for cyber security companies. It is home to the largest security cluster in Europe: The Hague Security Delta (HSD). Due to the presence of the national government, military and intelligence agencies and international organizations, an internationally renowned cyber security cluster has emerged, that has been united under the flag of HSD. This cluster offers you access to market, innovation, talent, knowledge and capital. If you are looking to expand your business to mainland Europe, we invite you to take notice of the top 10 reasons to invest and innovate in this region.

## DIGITAL GATEWAY TO EUROPE



### 1 STRONG DUTCH IT SECTOR

- Internet penetration among the highest in the world
- Most advanced broadband network in Europe
- Financial sector among the most advanced and open to new technology
- Internet usage among the highest in the world



### 2 CYBER MARKET

**€24B**

Dutch IT Market:  
€ 24 billion

**10%**

IT security is now 10% of  
the Dutch IT market

**14.5%**

14.5% growth / year



The Dutch economy is  
extremely dependent on IT

**€10B**

Annual damage in  
the Netherlands: € 10 billion

### 3 SECURE DIGITAL GATEWAY



#### Internet exchange point

12/14 internet cables  
US-EU go through NL  
(NFIA, 2016)



#### Internet speed

(17 MB/s) in the EU  
(source: Akamai, 2016)



#### Internet penetration

among highest in the world  
(source: Akamai, 2016)

*“The extensive  
use of the cyber  
domain puts  
Dutch society  
at risk”*

### 4 FASTEST GROWING DATACENTER MARKET IN EUROPE

IBM, Microsoft, Google, Equinix, Oracle, Palo Alto Networks



15% annual growth



20% of the European key datacenter market



82% occupancy rate

- Competitive energy pricing
- Among the most energy-efficient in the world
- Latency among highest in the world



206 data centers  
with 271,000m<sup>2</sup> net surface

### 5 CYBER CHALLENGES

- National Security
- Encryption
- Digital Forensics
- Responsible Disclosure
- Public- Private Cooperation

#### Organizations active in these fields:

- National Cyber Security Center: Deploying national ISAC's
- General and Military Intelligence Agencies
- Presence of national and international organizations:
- Europol (E3: European Cyber Crime Center), Eurojust, NATO
- (NCIA - Cyber Department), OPCW

## 6 LARGEST SECURITY CLUSTER IN EUROPE

Ecosystem named: The Hague Security Delta (HSD)



National security



Forensics



Urban security



Critical infrastructure



Cyber security

**The Hague is the cyber capital in the Netherlands**

(25% of the national turnover)



Dedicated HSD Office and SME Connect, providing matchmaking services

## BUSINESS OPPORTUNITIES



## 7 ACCESS TO MARKET

- Strong network of resellers and distributors
- 300 million consumers within 600 miles
- Located on mainland Europe, member of the EU and Eurozone
- The Dutch are very internet savvy (93% daily use)

## 8 LEADING COMPANIES



## TALENT & KNOWLEDGE



## 9 CYBER SECURITY TALENT

 **4,500 students** at research universities in IT related disciplines

 **2,000 students** at Universities of Applied Sciences

**Delft University of Technology:**

Mathematics & Computer Science, Cyber Security

**Cybersecurity Academy:**

Accredited MSc program at HSD Campus

**The Hague University of Applied Sciences:**

Cyber Security Management

**Leiden University:**

Executive Master in Cyber Security

**Cyber Security Summer School:**

NATO, Europol & HSD Campus

## 10 RESEARCH & INNOVATION

Strong collaboration within the triple helix (government, business and universities), resulting in:

- National Cyber Testbed
- National Research Agenda
- HHS Center of Excellence: Cyber
- TNO Cyber Security Lab
- Global Forum on Cyber Expertise
- Smart City Deal



**CENTURIES OF EXPERIENCE.  
AS A REAL-LIFE TESTING GROUND.**

