

10 Reasons

Why West
Holland is the
Hotspot for
Cyber
Security



Turn the
page and
explore!

**Innovation
Quarter**

*invest &
innovate in
West Holland*

10 Reasons why West Holland is the Hotspot for Cyber Security

The West Holland 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 the West Holland 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 **271,000m²** 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)



The Hague Security Delta

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:

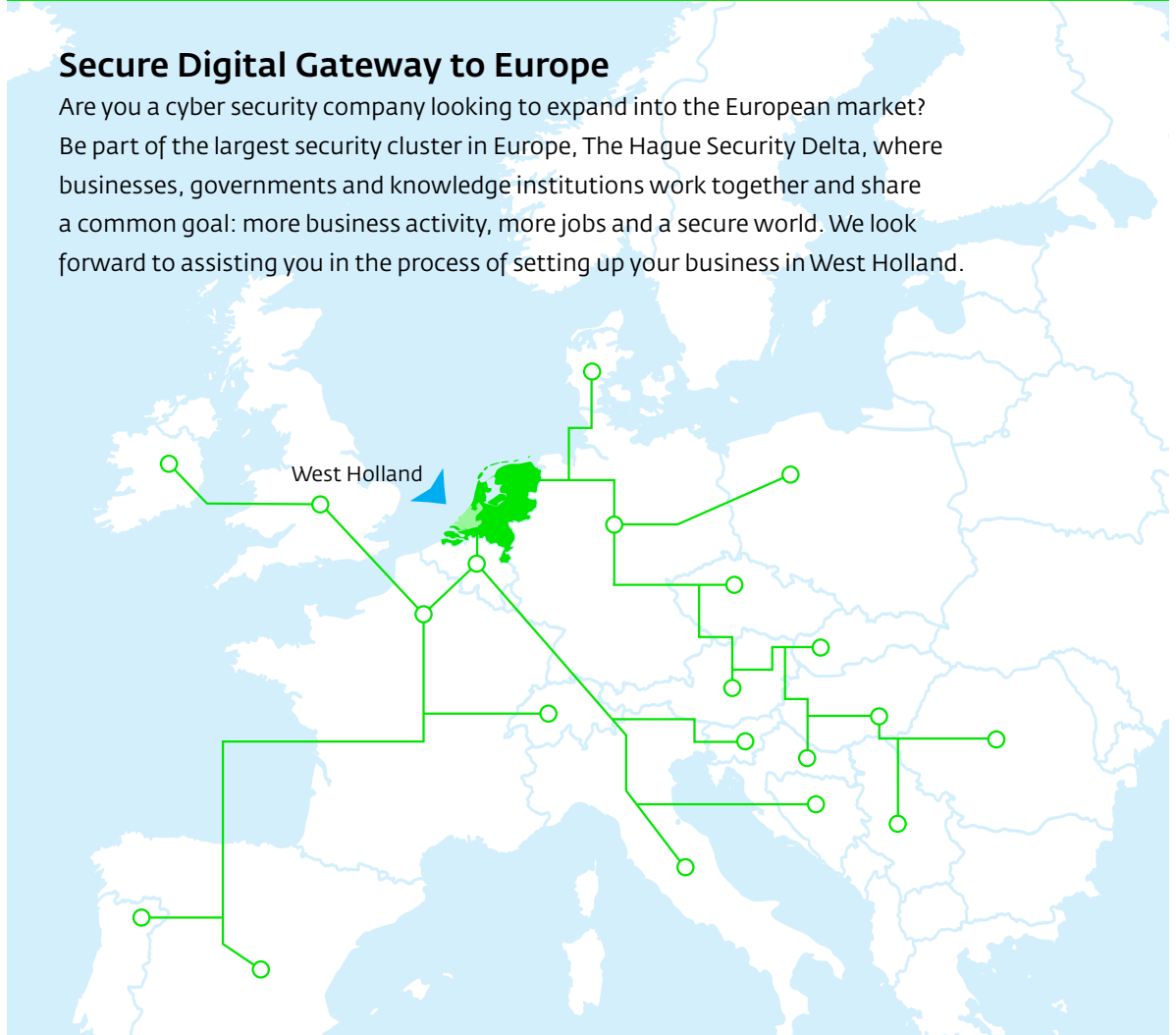
- National Cyber Testbed
- National Research Agenda
- HHS Center of Excellence: Cyber
- TNO Cyber Security Lab
- Global Forum on Cyber Expertise
- Smart City Deal



West Holland, the Hotspot for Cyber Security

Secure Digital Gateway to Europe

Are you a cyber security company looking to expand into the European market? Be part of the largest security cluster in Europe, The Hague Security Delta, where businesses, governments and knowledge institutions work together and share a common goal: more business activity, more jobs and a secure world. We look forward to assisting you in the process of setting up your business in West Holland.



InnovationQuarter is the Economic Development Agency for the West Holland region in the Netherlands. We provide free assistance and advice to international companies looking to locate in West Holland. In addition, we facilitate co-operation between companies, academic institutions and government. Moreover, InnovationQuarter funds innovative and fast-growing businesses in the region.

WEST HOLLAND OFFERS YOU

- A strategic location in the heart of Europe
- Highly educated and multilingual workforce
- Excellent quality of life
- A competitive tax climate
- A dedicated foreign investment team, offering confidential, free of charge services to international companies.



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