

IT in the Netherlands

Past - Current - Future

a critical observation

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1 Disclaimer

*this presentation is based on research
and +15 years experience with internet
industry in the Netherlands;
all facts & figures are checked;
links to sources on last slide.*

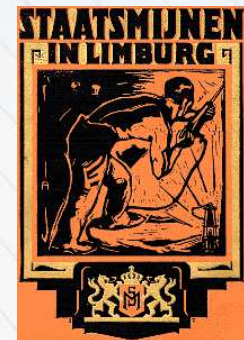
2 Past & tradition

A very rich past:

the Dutch conquered (almost) the world;
the Dutch were monopolists on spices, coffee;
tradition with shipbuilding;
industrial revolution: coalmines and heavy industries.

Leap to the 70's of last century:

coalmines closed due to cheap oil imports & natural gas;
car industry & shipyards collapsed.



3 The Dutch Transformation

early 80's shift from industrial production to services such as “office automation”.
manufacturing facilities:

- Philips
- IBM
- Sperry/Remington

scientific institutes / universities

The CWI logo, consisting of the letters "CWI" in a bold, white, sans-serif font, set against a red, trapezoidal background.

4 The Dutch markets - WHERE?

IT *was* based in Amsterdam, Eindhoven and Delft.
Today there are many more hotspots in this country.

Less known IT-hotspots are:

Rotterdam;

Groningen;

Twente with a superb Technical University;

Wageningen with it's famous agriculture University.



5 Current – 2 types of national issues

IT can help / is needed:

- healthcare;
 - farming/agro;
 - watermanagement;
 - energy – smartgrids;
 - traffic/mobility.
-
- more Export versus less Import;
 - Dutch disease.

6a The Dutch markets – Known vs Unknown

Known

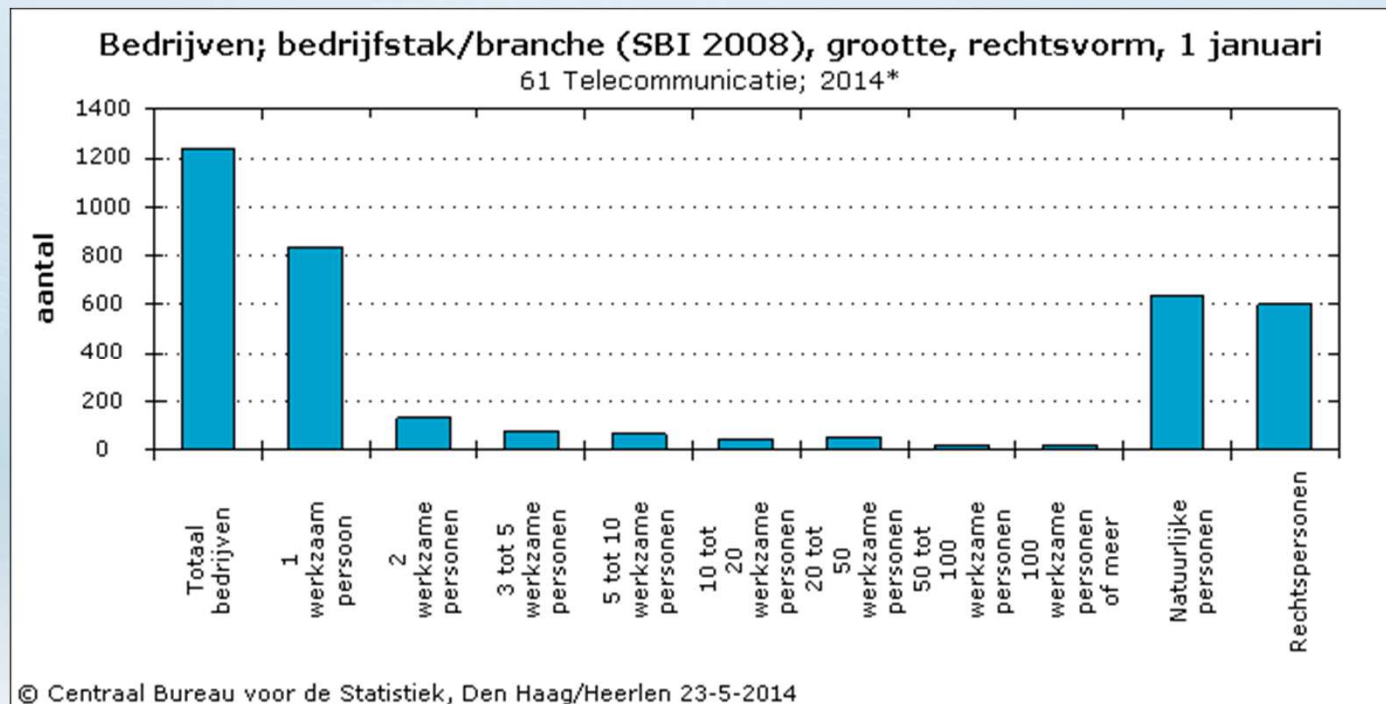
- excellent IT infrastructure;
- almost the starting point of the internet;
- the biggest Internet Exchanges;
- all global IT-players are here.
- NO harmonization of definitions for type and size of organisations.

Unknown

- the exact size of the market,
- number of companies;
- ... aka finding them!

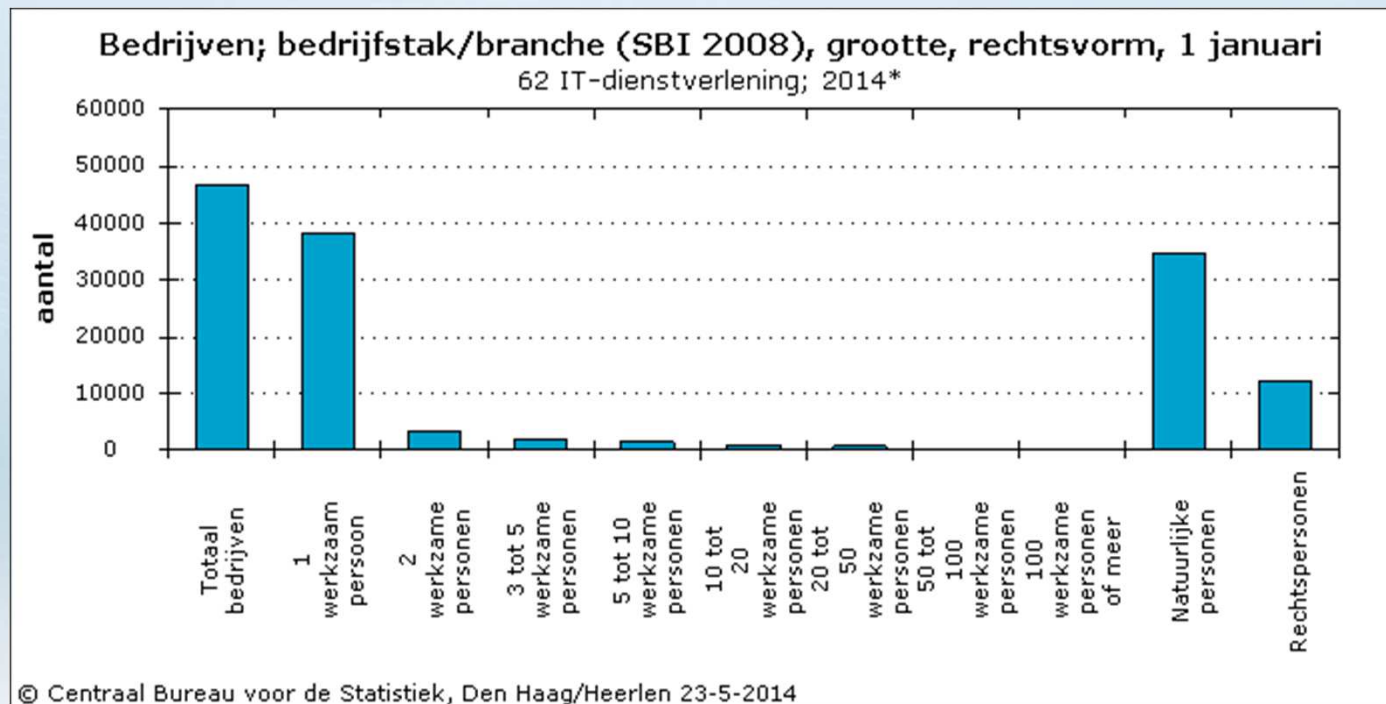
6b The Dutch markets – finding them (61)

61* telecommunications – 1.240



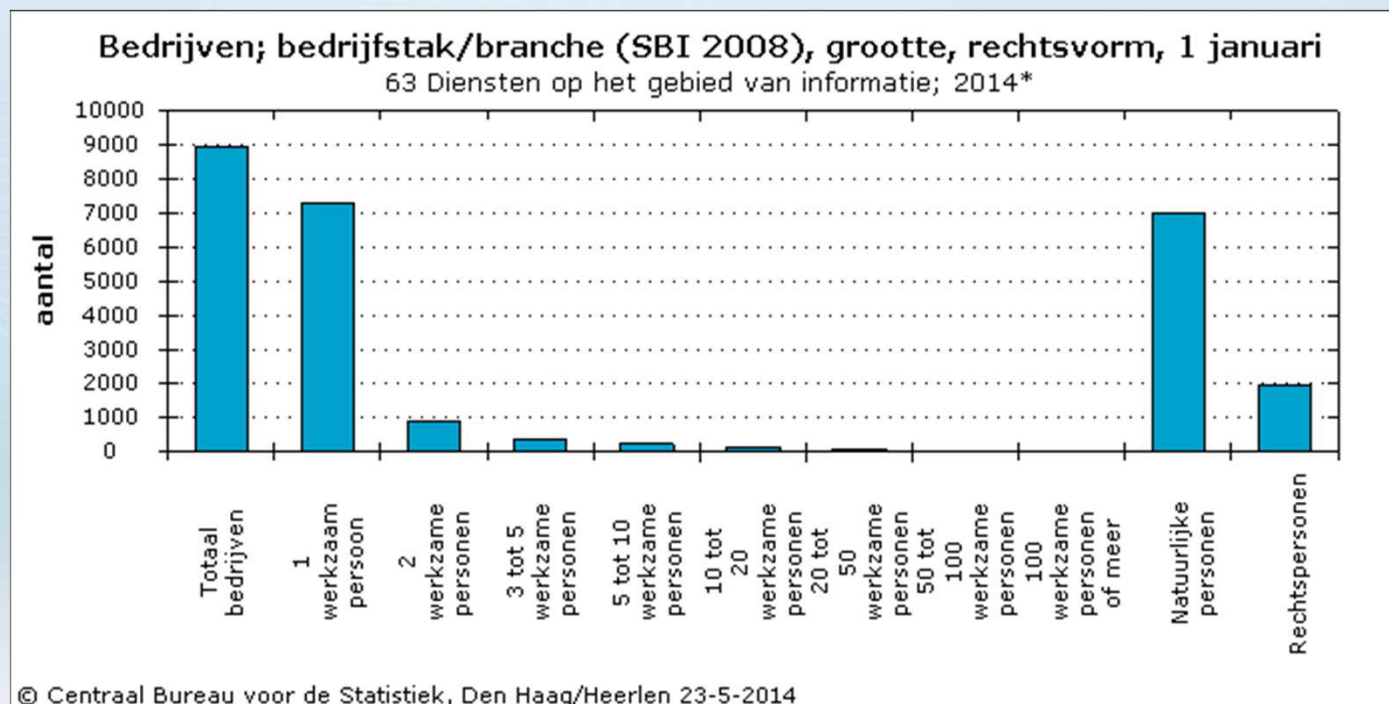
6c The Dutch markets – finding them (62)

62* support activities in the field of Information Technology – 46.630



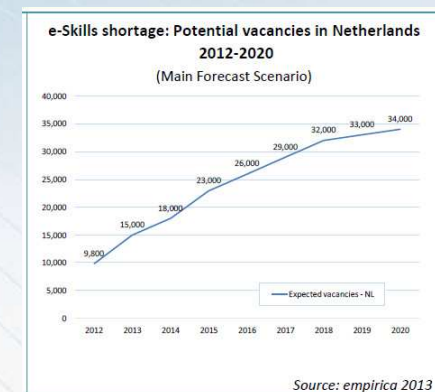
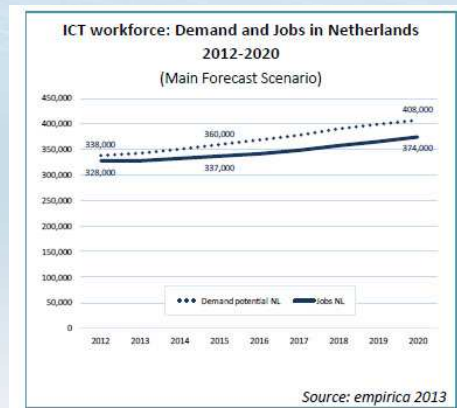
6d The Dutch markets – finding them (63)

63* Information service activities – 8.975



7 The Dutch markets - Darkish Clouds

- Impact of Internet bubble (2001~2003)
- Impact Bankingcrisis (2007~onwards)
- Legacy systems vs financial restraints
- Competition “start-up hotspots” Barcelona, Berlin, USA
- Demographics



8 The Dutch market – Sunny side

- new generations, willing to get rid of legacy
- high tech agriculture/farming
- high tech accountancy
- high tech music, arts
- SME's and SoHo: flexibility is the new normal
- working with international business partner & partnering is HOT and an USP

9 Dutch Market trends to remember

- the Dutch used to be nonchalant on IT
- quality and security
- BUT
- serious accidents changed IT landscape
- results: IS27001 and ISAE3402
- more focus on security
- NL wants to be cybersecurity hotspot



The screenshot shows the ISAE 3402 Certified Register website. The header includes the ISAE 3402 Certified logo, a "HOME" link, and the text "ISAE3402 REGISTER". The main content area is titled "Register" and includes a search filter for "Organisatie" and "Order" (Aflopend). Below the filter is a table listing certified organizations.

Nummer	Rating	ISAE type	Categorie
90 040 T&T Vertrouwd verbonden	✓✓✓	Type II	ASP/ SaaS
90 119 Infratecs	✓✓✓	Type II	ASP/ SaaS
90 145 Everest	✓✓✓	Type II	ASP/ SaaS

10 Dutch market ? questionmarks ?

- technical infrastructure: is it still 1.class
- education, is current workforce IT minded enough
- permanent education (crisis, money, age)
- international focus



11 Summary

Dutch IT-market 2014

Offering opportunities;

(remember that NL is more than Amsterdam and Rotterdam)

Nice niches and business opportunities;

(mainly to be found at smaller companies)

Willingness to work together;

(we have to!)

12 Advice

Q: How do I find IT-partners in this country.

A: What is the nr1 Dutch USP?

Internet and Connectivity,

(almost) everything is done online.

+1.000 B2B Internet providers and +100 datacenters

That is a *very good* starting point for knowing Dutch IT landscape.

Links

Pictures:

<http://upload.wikimedia.org/wikipedia/en/5/54/UnivacII.jpg>

<http://onecheapdadblog.blogspot.nl/>

http://en.wikipedia.org/wiki/Ford_Transit

http://nl.wikipedia.org/wiki/Wageningen_University_%26_Research_centre

http://commons.wikimedia.org/wiki/File:Universiteit_Twente_Spiegel_2005-07-10.jpg

http://nl.wikipedia.org/wiki/Staatsmijnen_in_Limburg

http://upload.wikimedia.org/wikipedia/commons/thumb/3/37/DAF_img_2296.jpg/800px-DAF_img_2296.jpg

Documents:

SBI codes - http://www.kvk.nl/download/Eng_SBI%20boek_02_02_2014_tcm109-386605.pdf

Number of companies - <http://statline.cbs.nl/StatWeb/publication/?DM=SLNL&PA=81589ned&D1=a&D2=962&D3=l&HDR=G2,T,G1&CHARTTYPE=1&VW=T>

E-Skills - <http://eskills2013.eu/conference/documents/>

