

# ORF SEE IT - Development of Regional Export Promotion Action Plan

IT Market Analysis The Netherlands

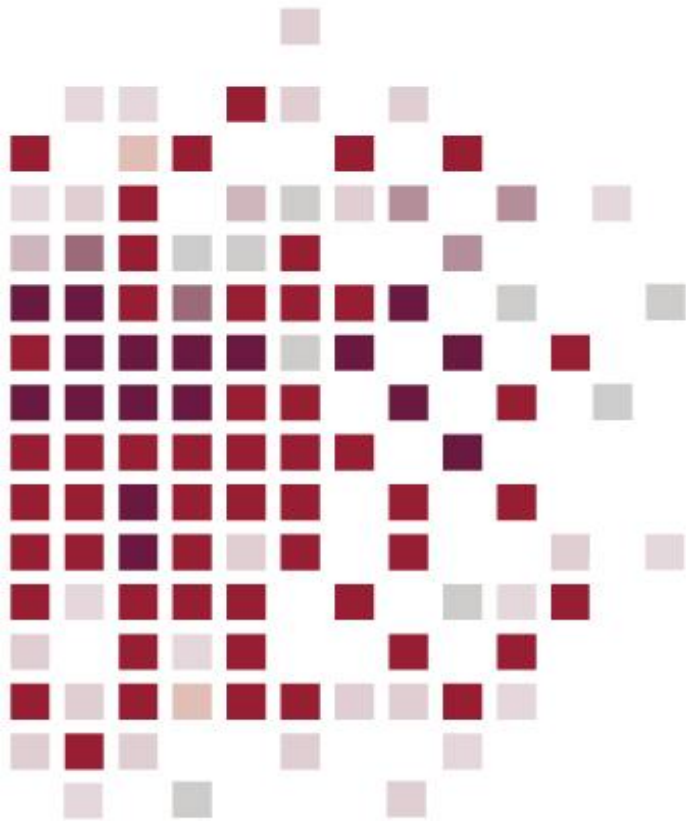
April, 2014

# IT Market Analysis The Netherlands



# Agenda

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## 1. ICT Market

2. Software Market

3. IT Services Market

4. IT Outsourcing

5. Key Success Factors for Exporting

# Netherlands – Country Overview

Netherlands- Key Economic Indicators			
	2010	2011	2012
Population (Mio)	16.6	16.7	16.8
GDP (Bn EUR)	541.26	589.34	582.32
Real GDP/ Capita (EUR)	33100	33200	33700
GDP Growth	1.5%	0.9%	-1.2%
Trade Balance of Payments (%GDP)	7.4%	9.5%	9.4%
Inflation Rate	1.3%	2.3%	2.5%
Umemployment Rate	4.5%	4.5%	5.3%

Source: Statistics Netherlands, OECD, Eurostat

## The Netherlands – ICT market overview (1/4)

IT Services and Telecom Services are the largest segments – Software is the fastest growing one

Total ICT market value by segment 2010 – 2014 (in € billion)					
Segment	2010	2011	2012	2013	2014*
IT Equipment	3.4	3.4	3.6	3.6	3.7
<b>Software</b>	4.2	4.4	4.6	4.8	<b>5.1</b>
<b>IT Services</b>	12.2	12.1	12.2	12.5	<b>12.9</b>
Telecommunication Equipment	2.6	2.7	3.0	3.1	3.2
Telecom Services	9.9	9.7	9.6	9.6	9.6
<b>Total ICT</b>	<b>32.3</b>	<b>32.4</b>	<b>33.0</b>	<b>33.5</b>	<b>34.3</b>
Total ICT market growth rates by segment 2011 – 2014 (in %)					
Segment	2011	2012	2013	2014*	
IT Equipment	-2.0%	5.9%	0.3%	2.5%	
<b>Software</b>	4.8%	4.0%	4.4%	<b>4.9%</b>	
<b>IT Services</b>	-0.1%	0.3%	2.3%	<b>3.3%</b>	
Telecommunication Equipment	4.1%	12.5%	0.3%	3.3%	
Telecom Services	-1.7%	-1.5%	0.4%	-0.6%	
<b>Total ICT</b>	<b>0.2%</b>	<b>1.9%</b>	<b>1.6%</b>	<b>2.3%</b>	

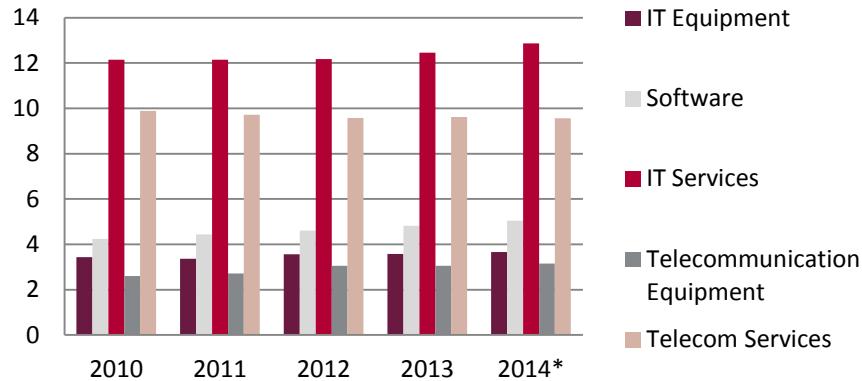
Source: EITO 2013

\*Estimated values

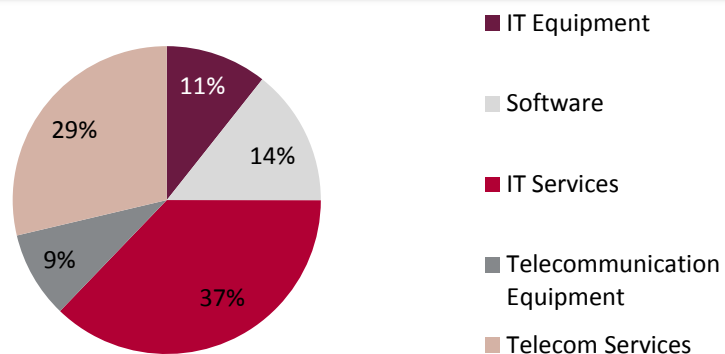
# The Netherlands – ICT market overview (2/4)

## ICT Market is expected to see a lack-lustre growth in the near future

ICT market value by segment (in € billion)



ICT market shares by segment (2013 in %)



Overview

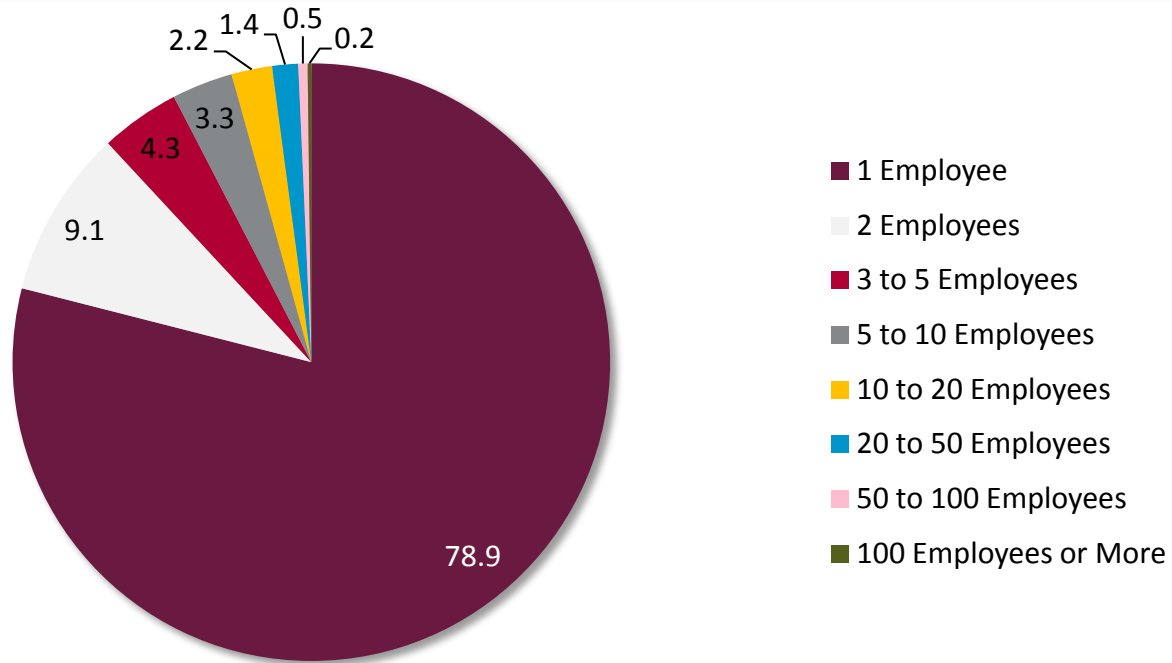
- The total growth in the ICT market in 2013 saw a decline of 0.3% when compared on a Y-to-Y basis
  - The outlook for 2014 does not seem to be very bright either, the ICT spending is expected to remain practically at the same level as it was in 2013
- Growth in IT Equipment is expected to decline the most by 5.6% in 2013 when compared to the previous year primarily due to:
  - Continuing recession which is forcing companies to postpone replacement investments
  - Increase in digitization which is curtailing the spend on sub-segment printers and multi-function printers
- On the other hand, the spend on Telecommunication Equipment has also seen a drop in growth by 12.2% from 2012 to 2013, but is expected to rise by 3% due to increase in the penetration level of smartphones and increase in demand for internet data plans
- In terms of growth from 2013 onwards:
  - IT Software and IT Services are in a far better position than IT Equipment and Telecom Services

Source: Number and Trends, ICT Market Monitor 2013

# The Netherlands – ICT market overview (3/4)

Around 79% of the ICT companies are “one-man-armies”

ICT companies by number of employees, 2012 (in %)



**Two key reasons as to why the entry barrier to start an ICT company is low:**

- ➔ Lower initial start-up cost
- ➔ Business of the ICT sector is mainly knowledge

Source: Number and Trends, ICT Market Monitor 2013

# The Netherlands – ICT market overview (4/4)

## Key aspects and strengths

- **European leader in embedded systems**; world leader in micro-chip manufacturing equipment
- Main strength: turn existing technologies in innovative products and services
  - **70% of innovation is IT-related**
  - multiple PPPs, e.g. parallel computing, modeling, embedded systems, virtual laboratories
- Hosts number of **high-capacity networks used for R&D** (SURFNet, GigaPort, Netherlight): facilitates co-operation of hundreds-of-thousands of researchers and students worldwide
- **Fourth-largest exporter of IT Services** (after US, UK and Germany)
- **Third-largest online gaming market of Europe**

Source: OECD, ITEA, Artemis, ICT Office, WEF, ICT Market Monitor 2010 - CBS, Eurostat

## The Netherlands – ICT market key trends (1/2)

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- Dutch IT spending will be slow but boosted by mobility
- **Mobility** will drive the corporatization of consumers
- The Dutch telecom market will be data driven; overall revenue will remain flat in 2013
- Social Marketing will reach a paradigm shift
- **Enterprise Social Collaboration** will continue to be the fastest-growing software market
- Dutch shopkeepers will embrace omni-channel retailing strategies
- Private cloud adoption will drive **enterprise public cloud growth**
- Server virtualization will remain an important investment area
- **IT services industry in the Netherlands will consolidate:** survive and acquire
- CIOs will play a smaller role in the evaluation and ownership of ICT investments

Source: IDC

# The Netherlands – ICT market key trends (2/2)

Sustainability practice and government schemes can help in reviving the ICT market, however challenging labor conditions in the years to come can have a lasting effect

## Low growth

- Overall consumers sentiment is not very upbeat when it comes to ICT spending primarily due to:
  - Tight wallets
  - Uncertain global economic condition
  - Government spending cut

## Increased software spending

- **IT Software is the only segment which is expected to propel the overall ICT market**

## Government schemes

- The government has introduced policies and schemes such as WBSO<sup>1</sup> and RDA<sup>2</sup> to encourage innovation and R&D
- Collaborating with the Horticulture & Propagation Materials, Creative Industry and Energy top sectors

## Increasing sustainability practice

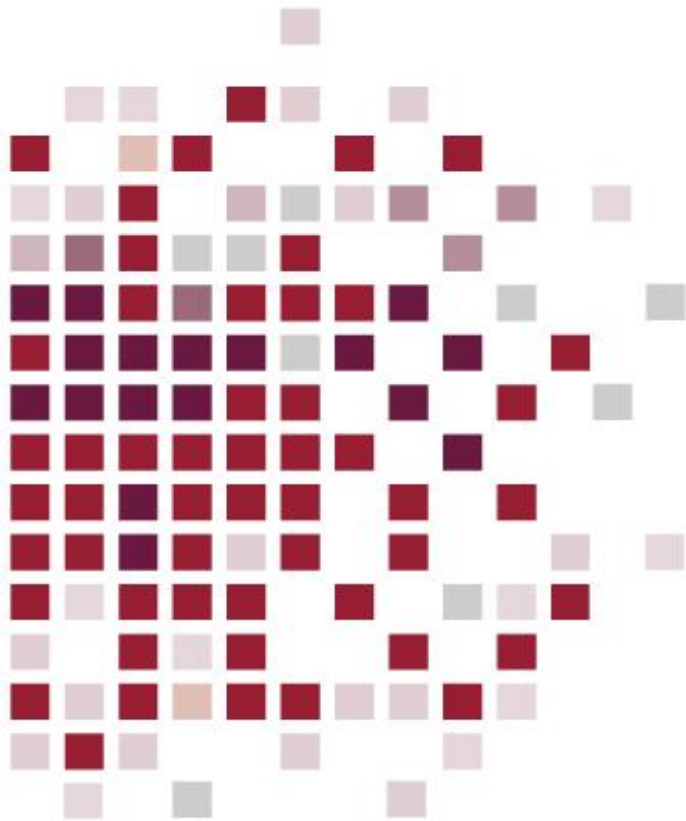
- The ICT sector has agreed with the Dutch government to bring in energy efficiency of nearly 30% by 2020
- An ICT collection system was set up in 1999 to collect and recycle all ICT hardware material in a responsible manner
- Over 95% of ICT waste is collected recycled and reused in Netherlands

## Gloom in ICT labor market

- As of January 2013 the total number of unemployed ICT professionals was 3.9% which is at the same level as 2010
- **There is a forecast likely deficit of almost 10,000 ICT professionals in 2014 and 6,800 in 2017 due to mismatch in demand and supply**

1. Wet Bevordering Speur- en Ontwikkelingswerk; 2. Research and Development Allowance  
Source: Number and Trends, ICT Market Monitor 2013

# Agenda



1. ICT Market
2. **Software Market**
3. IT Services Market
4. IT Outsourcing
5. Key Success Factors for Exporting

## The Netherlands – Software market overview (1/2)

Application software products as the largest, and SaaS as the fastest growing segment

Total software market value by segment 2010 – 2017 (in € billion)							
Segment	2011	2012	2013	2014*	2015*	2016*	2017*
Infrastructure software & platforms	1.0	1.0	1.0	1.0	1.0	1.1	1.1
Application software products	2.0	2.0	2.0	2.1	2.2	2.2	2.3
SaaS	0.1	0.1	0.1	0.2	0.2	0.2	0.3
<b>Total software</b>	<b>3.1</b>	<b>3.1</b>	<b>3.1</b>	<b>3.2</b>	<b>3.4</b>	<b>3.5</b>	<b>3.6</b>

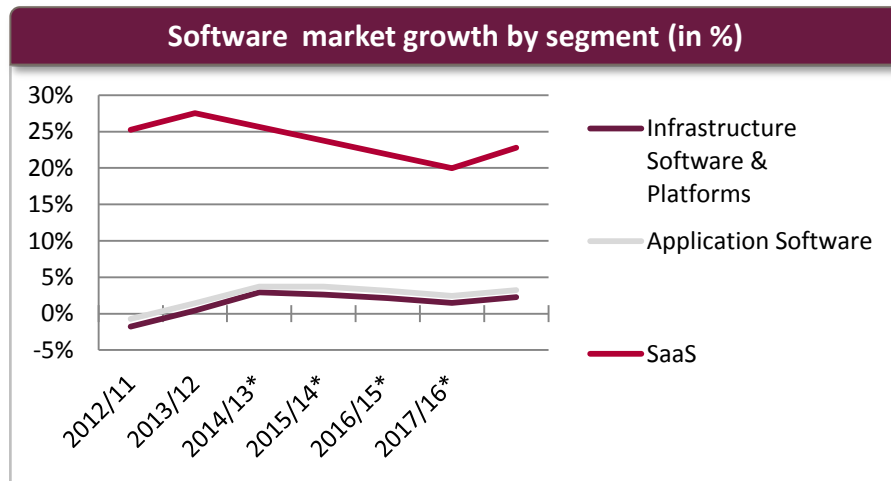
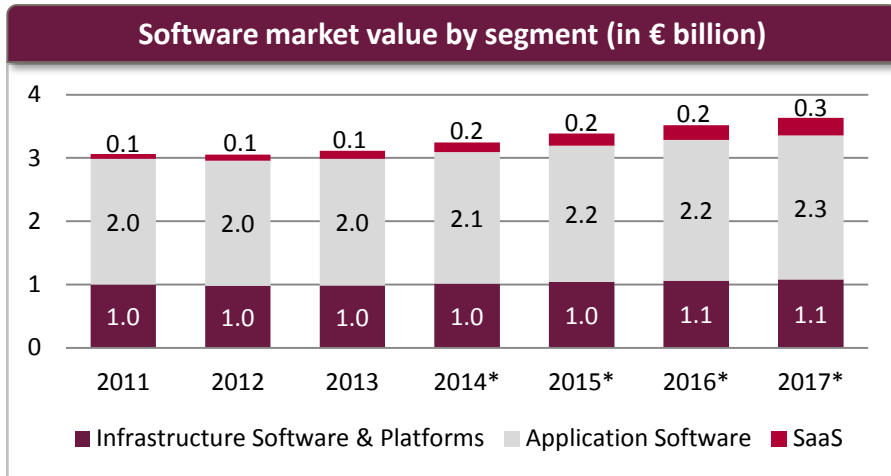
Total software market growth rates by segment 2011 – 2017 (in %)							
Segment	2012/11	2013/12	2014/13*	2015/16*	2016/17*	2017/16*	CAGR
Infrastructure software & platforms	-1.8%	0.4%	2.9%	2.6%	2.1%	1.5%	2.3%
Application software products	-0.7%	1.4%	3.7%	3.7%	3.1%	2.4%	3.3%
SaaS	25.2%	27.5%	25.6%	23.7%	21.9%	20.0%	22.8%
<b>Total software</b>	<b>-0.4%</b>	<b>1.9%</b>	<b>4.3%</b>	<b>4.4%</b>	<b>3.9%</b>	<b>3.3%</b>	<b>4.0%</b>

Source: PAC 2013

\*Estimated values

# The Netherlands – Software market overview (2/2)

## Application software products as the largest, SaaS as the fastest growing segment



**Overview**

- 3<sup>rd</sup> largest software market of Europe**
  - **Renewed spending** by enterprises for applications and tools designed to **improve IT efficiencies and infrastructure management** through automation
  - **Investment in virtualization software, storage applications & security applications**
- The overall spending in the software market is seeing a stable growth with a CAGR of 4% from 2013 – 2017
  - Spending in Infrastructure Software & Platforms remains constant with a slight growth from 2016 onwards
  - Spending in Application Software is forecasted to grow by an CAGR of 3.3% for the time of 2013 – 2017
  - Increase in demand for software programs for consumer, commercial, industrial and technical applications
  - The rise of the development of 'apps' continues throughout the country
- Software as a Service (SaaS) as the key driver of the software market with a CAGR of 22.8% for the time of 2013 – 2017**

Source: Number and Trends, ICT Market Monitor 2013, PAC 2013

\*Estimated values

# The Netherlands – Software market key trends

Stable growth rate, a strong domestic market and large investments in R&D

## Research and Development

- **The Dutch software sector has a large number of labor capacity dedicated to R&D**
- Companies that derive a relatively large proportion of their revenue from new products use much of their capacity for R&D
- The proportion of R&D is noted to be highest among software developers
- **Large potential for Software Testing for SEE IT companies**

## Strong domestic market

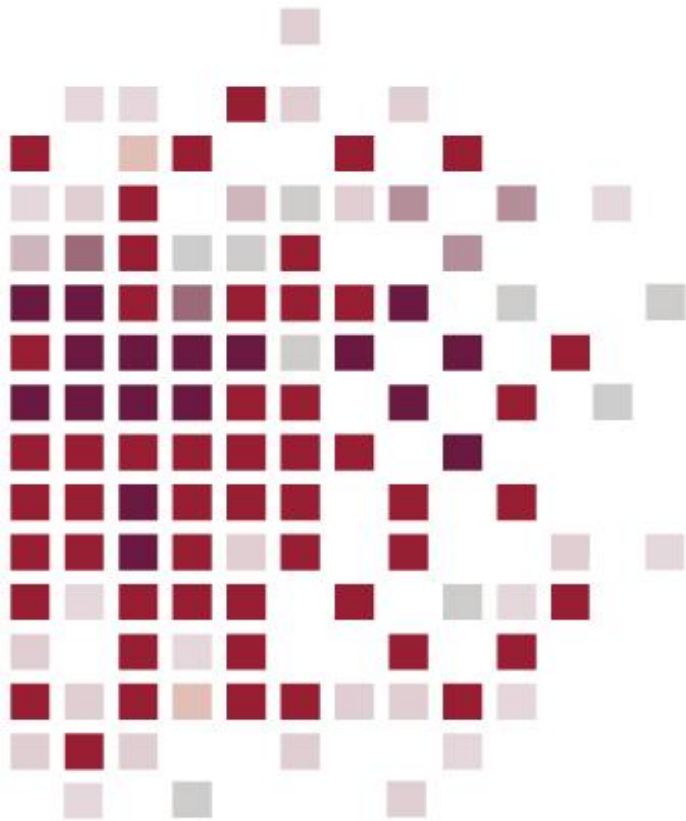
- Most of the software in the Netherlands is developed **domestically of which 7.9% is produced abroad**, half of which (4%) in their own subsidiaries
- Majority of outsourced software work takes place in nearby wealthy countries
- **Great nearshoring potential for SEE IT companies in the future due to cost efficiency-seeking**

## Corner stone of the market

- **Software market is proving to be the corner stone for the overall ICT market**
- **SaaS as the key driver of the total Software market**

Source: Number and Trends, ICT Market Monitor 2013; The Dutch Software Sector, Survey 2010

# Agenda



1. ICT Market
2. Software Market
3. **IT Services Market**
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5. Key Success Factors for Exporting

## The Netherlands – IT Services market overview (1/2)

BPO is the strongest growing segment – Infrastructure Services (incl. Infrastructure outsourcing) is the largest segment concerning its volume

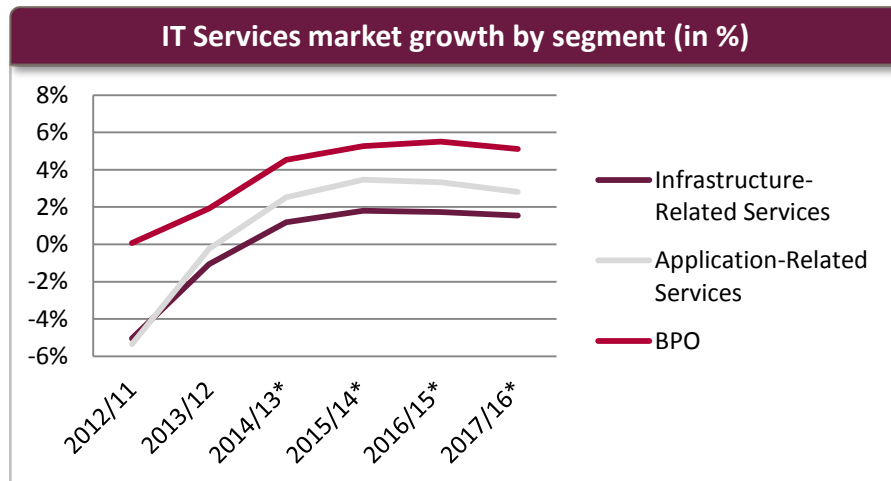
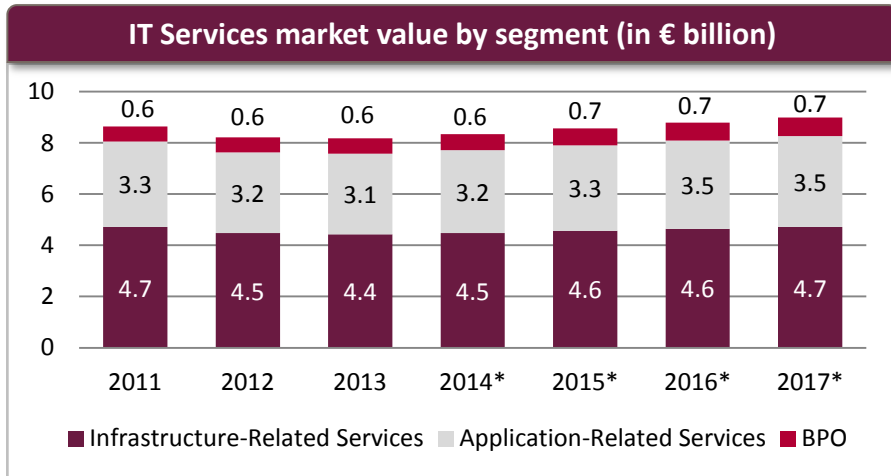
Total IT Services market value by segment 2010 – 2017 (in € billion)							
Segment	2011	2012	2013	2014*	2015*	2016*	2017*
Infrastructure-Related Services	4.7	4.5	4.4	4.5	4.6	4.6	4.7
Application-Related Services	3.3	3.2	3.1	3.2	3.3	3.5	3.5
BPO	0.6	0.6	0.6	0.6	0.7	0.7	0.7
<b>Total IT Services</b>	<b>8.6</b>	<b>8.2</b>	<b>8.2</b>	<b>8.3</b>	<b>8.6</b>	<b>8.8</b>	<b>9.0</b>
Total IT Services market growth rates by segment 2011 – 2017 (in %)							
Segment	2012/11	2013/12	2014/13*	2015/16*	2016/17*	2017/16*	CAGR
Infrastructure-Related Services	-5.0%	-1.1%	1.2%	1.8%	1.7%	1.6%	1.6%
Application-Related Services	-5.4%	-0.2%	2.5%	3.5%	3.3%	2.8%	3.0%
BPO	0.1%	1.9%	4.5%	5.3%	5.5%	5.1%	5.1%
<b>Total IT Services</b>	<b>-4.8%</b>	<b>-0.5%</b>	<b>2.0%</b>	<b>2.7%</b>	<b>2.6%</b>	<b>2.3%</b>	<b>2.4%</b>

Source: PAC 2013

\*Estimated values

# The Netherlands – IT Services market overview (2/2)

IT Services market is under pressure due to budget cuts by the government and clients



### Overview

- **The overall IT Services market declined by 4.8% in the year 2012, and by 0.5% in 2013 when compared on a Y-to-Y basis**
  - It will slowly recover beginning in 2013/14, with a foreseen CAGR of 2.4% for 2013 – 2017
  - **BPO as the key driver of growth**
- Infrastructure-Related Services maintain low growth rates, with a CAGR of 1.6% for 2013 – 2017
- The primary reasons for the decline in IT Services market were:
  - Global economic downturn
  - Budget cuts (Dutch government is in the process of consolidating its IT assets → decrease number of datacenters by using private cloud solutions)
  - In-house services
  - Technological innovations

Source: Number and Trends, ICT Market Monitor 2013, PAC 2013

\*Estimated values

# The Netherlands – IT Services market key trends

In-house services as well as the dominant role of technological innovations are the key trends

## In-house Services

- Due to tight wallets and uncertain conditions in the Eurozone and around the globe, companies are postponing their major IT investment plans (for e.g. delayed replacements)
- They are relying more on in-house services for the required hardware support

## Technological Innovation

- **Innovations** such as the shift to cloud services is proving to be very beneficial for the companies as:
  - this eliminates large upfront investments and
  - helps in curtailing unnecessary expenses by limiting the volume of administrative support and charges

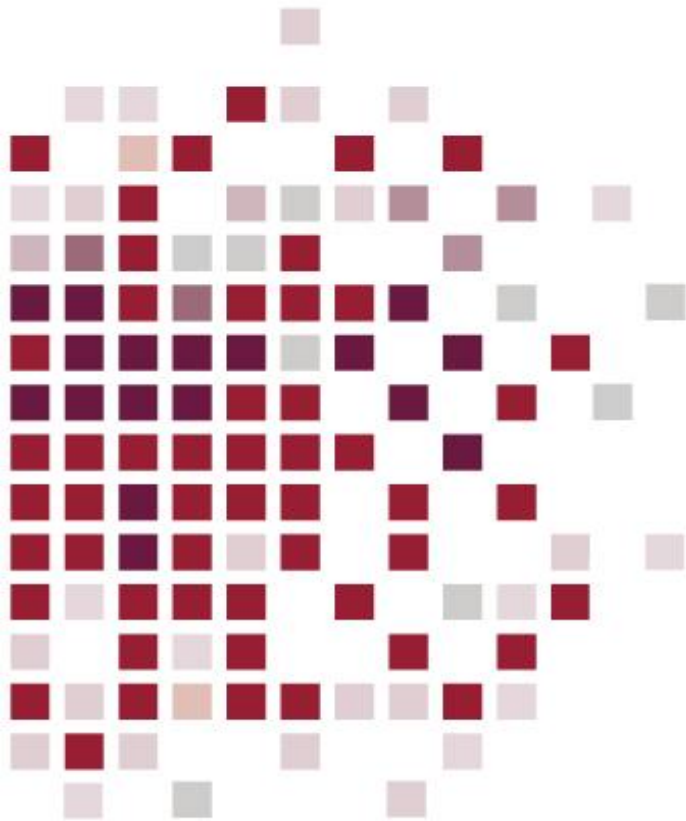
## Budget cuts & Private cloud

- Dutch government is in the process of consolidating its IT assets
  - decrease number of datacenters by using private cloud solutions
- **Increasing demand for private cloud solutions**

Source: Number and Trends, ICT Market Monitor 2013

# Agenda

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1. ICT Market
2. Software Market
3. IT Services Market
4. **IT Outsourcing**
5. Key Success Factors for Exporting

## The Netherlands – IT Outsourcing market value by segments (in € million)

Segments & Sub-segments			2010	2011	2012	2013	2014*	2015*	2016*
Cloud Services	Infrastructure as a Service (IaaS)	Cloud Compute Services	36	49	73	105	157	215	259
		Cloud Print Services	1	1	1	1	1	1	2
		Storage as a Service	22	24	24	27	29	30	31
<b>Total (Cloud Services)</b>			<b>58</b>	<b>74</b>	<b>98</b>	<b>133</b>	<b>187</b>	<b>247</b>	<b>291</b>
Infra-structure Outsourcing	Data Center Outsourcing	Data Center Outsourcing	1,685	1,644	1,611	1,603	1,605	1,606	1,634
	End User Device Outsourcing	Desktop	648	620	621	622	624	628	637
		Mobile	36	69	70	73	77	82	88
	Enterprise Network Outsourcing		1,015	1,000	1,002	1,008	1,014	1,020	1,035
	Help Desk Outsourcing		125	125	125	125	126	127	129
	Infrastructure Utility Services		225	289	294	309	326	346	370
<b>Total (Infrastructure Outsourcing)</b>			<b>3,735</b>	<b>3,746</b>	<b>3,723</b>	<b>3,741</b>	<b>3,772</b>	<b>3,807</b>	<b>3,893</b>
Applications Outsourcing	Commercial Application Outsourcing		324	325	326	328	330	332	339
	<b>Custom Application Outsourcing</b>		203	196	196	198	199	200	204
<b>Total (Applications Outsourcing)</b>			<b>527</b>	<b>521</b>	<b>522</b>	<b>526</b>	<b>529</b>	<b>532</b>	<b>543</b>
<b>Total (IT Outsourcing)</b>			<b>4,320</b>	<b>4,342</b>	<b>4,343</b>	<b>4,400</b>	<b>4,489</b>	<b>4,586</b>	<b>4,727</b>

Source: Gartner 2013

\*Estimated values

## The Netherlands – IT Outsourcing market growth by segments (in %)

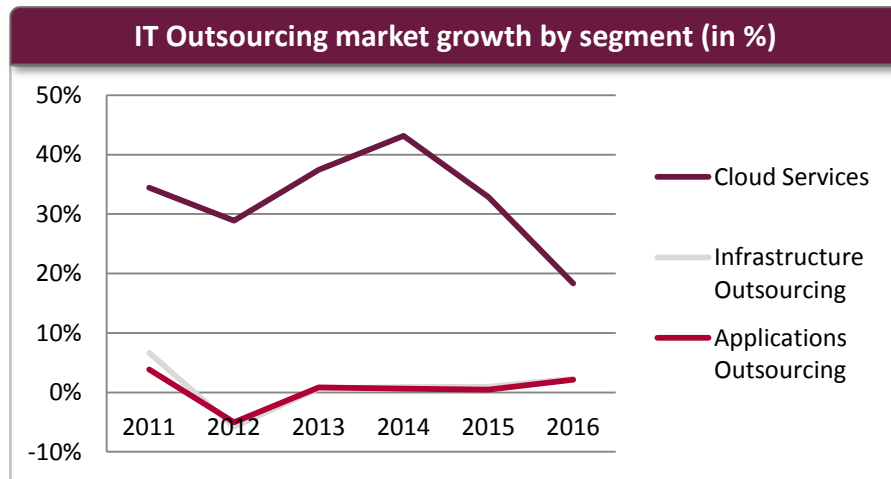
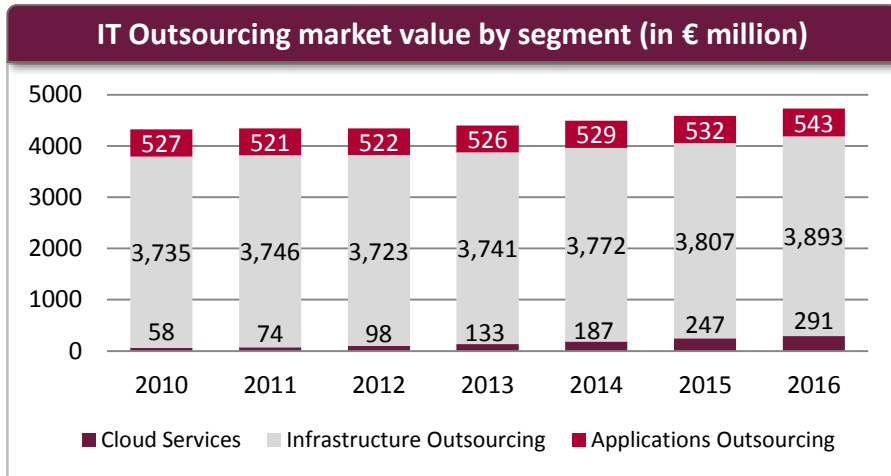
Segments & Sub-segments			2011	2012	2013	2014*	2015*	2016*
Cloud Services	Infrastructure as a Service (IaaS)	Cloud Compute Services	44.1%	39.7%	44.4%	50.2%	37.1%	20.4%
		Cloud Print Services	8.3%	10.0%	14.7%	13.1%	11.0%	10.2%
		Storage as a Service	15.3%	-2.6%	11.4%	6.6%	4.2%	1.8%
<b>Total (Cloud Services)</b>			<b>34.4%</b>	<b>28.9%</b>	<b>37.4%</b>	<b>43.2%</b>	<b>32.9%</b>	<b>18.3%</b>
Infrastructure Outsourcing	Data Center Outsourcing	Data Center Outsourcing	2.4%	-7.1%	-0.3%	0.1%	0.0%	1.8%
	End User Device Outsourcing	Desktop	0.4%	-5.0%	0.3%	0.4%	0.5%	1.4%
		Mobile	98.8%	-3.2%	4.8%	5.0%	6.0%	8.0%
	Enterprise Network Outsourcing		3.4%	-5.0%	0.8%	0.6%	0.6%	1.5%
	Help Desk Outsourcing		4.4%	-5.1%	0.7%	0.5%	0.4%	1.7%
	Infrastructure Utility Services		35.2%	-3.5%	5.2%	5.5%	6.0%	7.0%
<b>Total (Infrastructure Outsourcing)</b>			<b>6.7%</b>	<b>-5.8%</b>	<b>0.7%</b>	<b>0.9%</b>	<b>0.9%</b>	<b>2.3%</b>
Applications Outsourcing	Commercial Application Outsourcing		5.4%	-5.0%	0.9%	0.6%	0.5%	2.1%
	<b>Custom Application Outsourcing</b>		1.4%	-5.0%	0.8%	0.6%	0.5%	2.1%
<b>Total (Applications Outsourcing)</b>			<b>3.9%</b>	<b>-5.0%</b>	<b>0.8%</b>	<b>0.6%</b>	<b>0.5%</b>	<b>2.1%</b>
<b>Total (IT Outsourcing)</b>			<b>6.8%</b>	<b>-4.9%</b>	<b>1.8%</b>	<b>2.6%</b>	<b>2.6%</b>	<b>3.2%</b>

Source: Gartner 2013

\*Estimated values

# The Netherlands – IT Outsourcing market

## Strong growth of Cloud Services and moderate growth of Infrastructure and Application Outsourcing



**Overview**

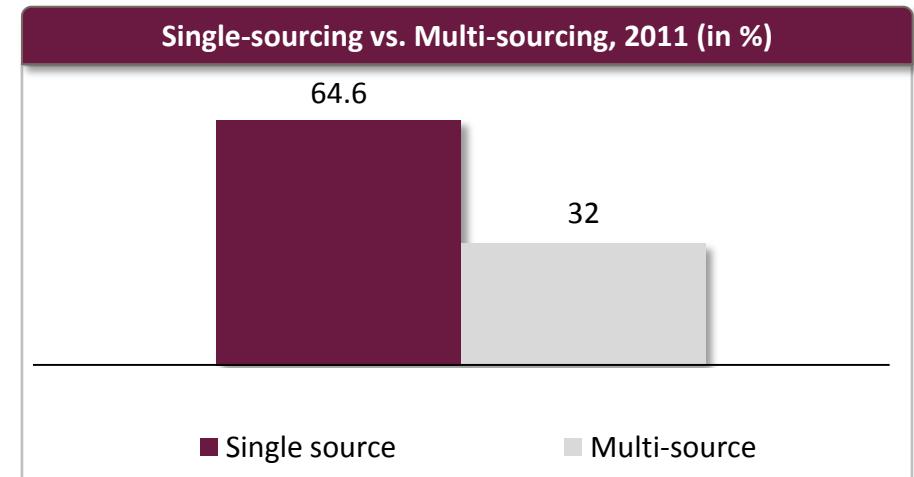
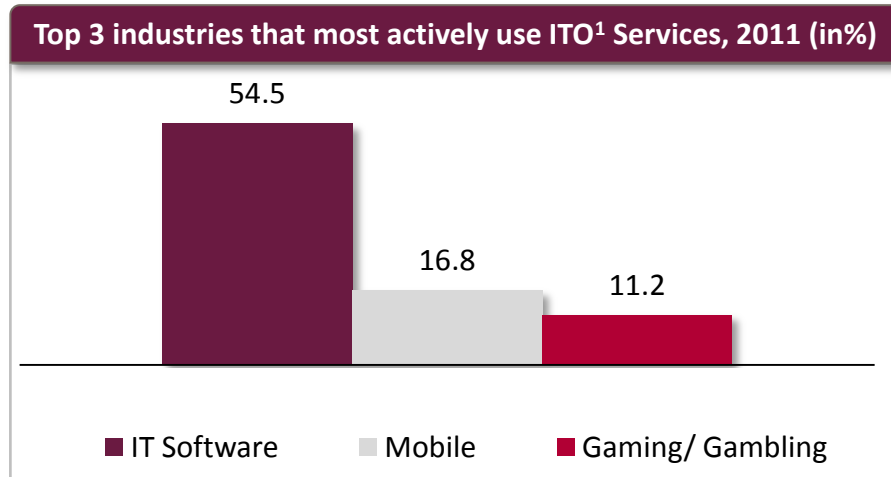
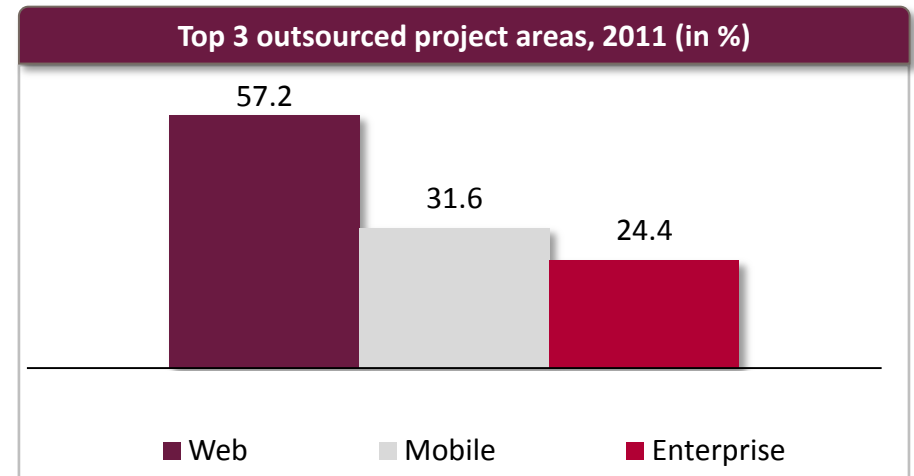
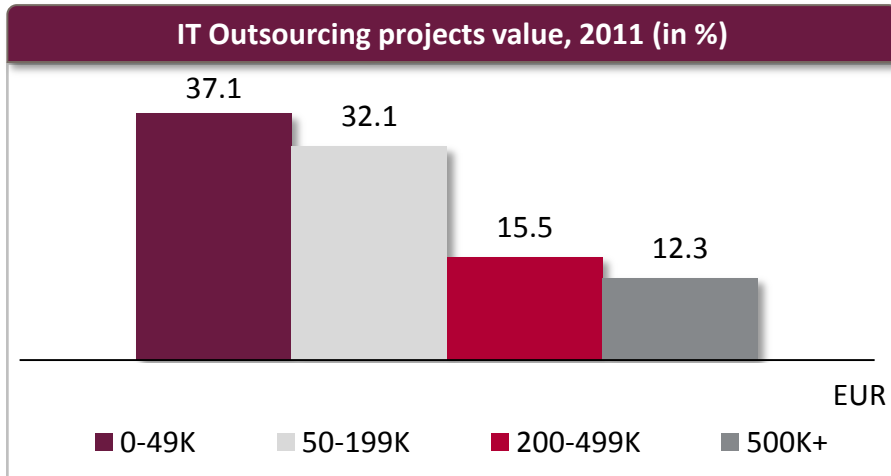
- Cloud services with double-digit growth rates as the key driver of the segment
- After a decline in growth rates (2011-2012), Infrastructure and **Applications Outsourcing return to moderate growth rates**
- Infrastructure Outsourcing remains the largest segment (by value), dominated by Data Center and Enterprise Network Outsourcing
  - Mobility (within the End-User Devices Outsourcing Sub-segment) shows strong growth pattern
- Future outlook predicts a falling but still significant growth of Cloud Services, whereas Infrastructure and Application outsourcing will face stable and moderate growth

Source: Gartner 2013

\*Estimated values

# The Netherlands – IT Outsourcing intelligence overview (1/5)

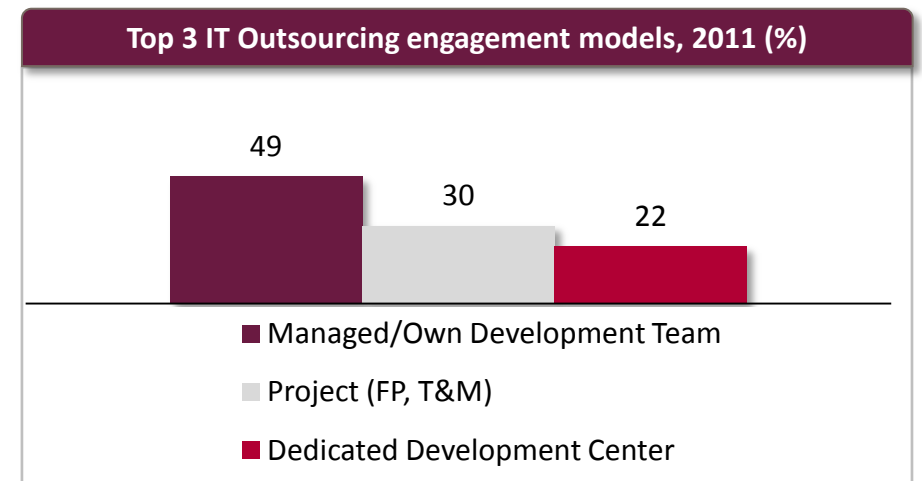
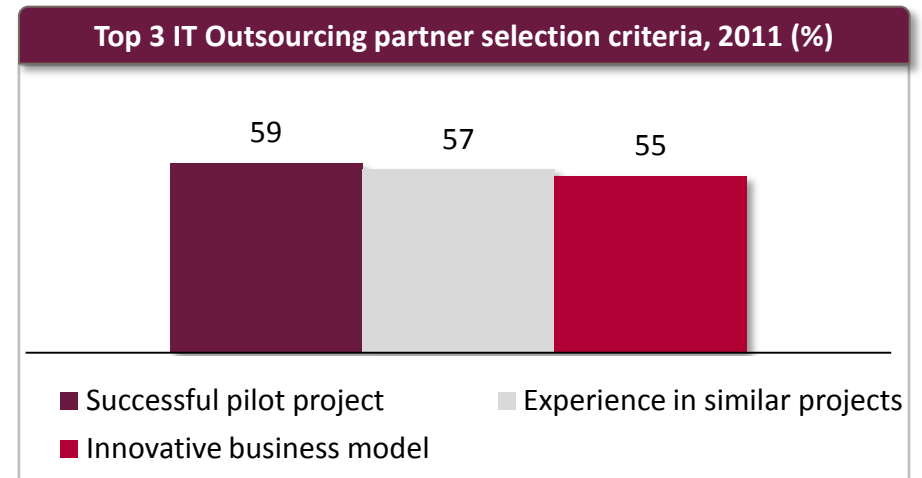
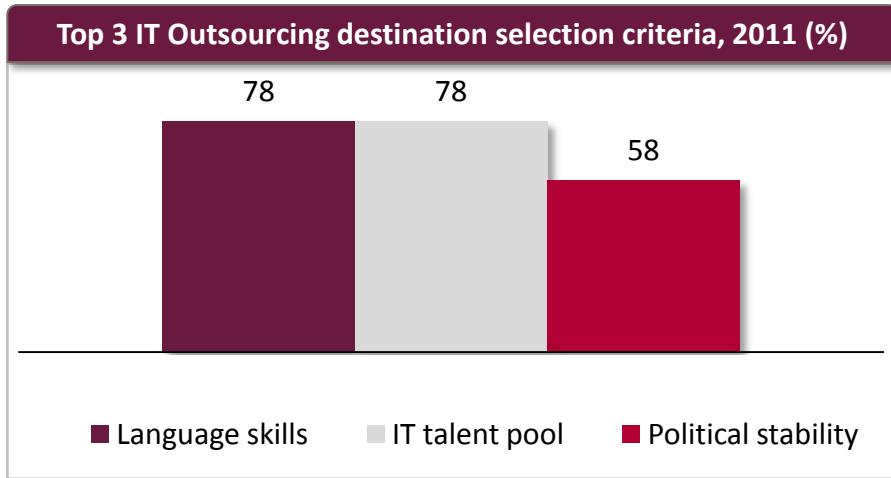
## Software industry as the most active outsourcing industry



1. Information Technology Outsourcing  
Source: Pan-European IT Outsourcing Intelligence Report, 2011

# The Netherlands – IT Outsourcing intelligence overview (2/5)

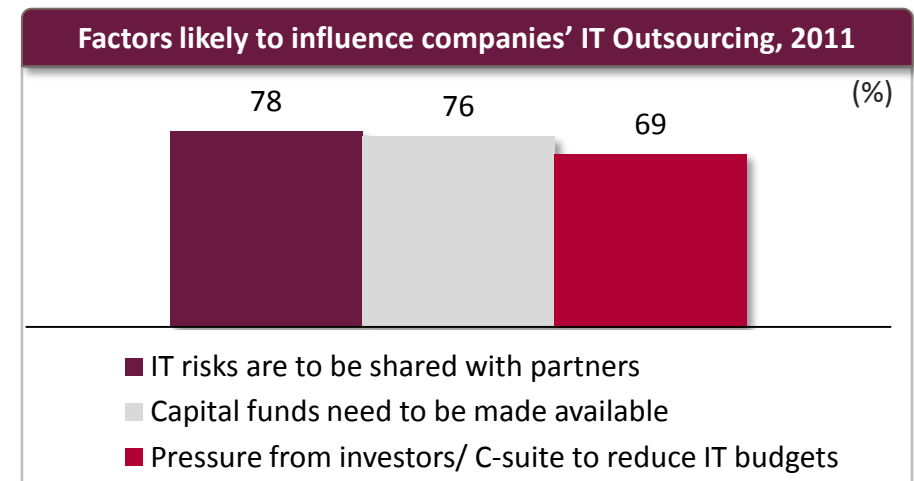
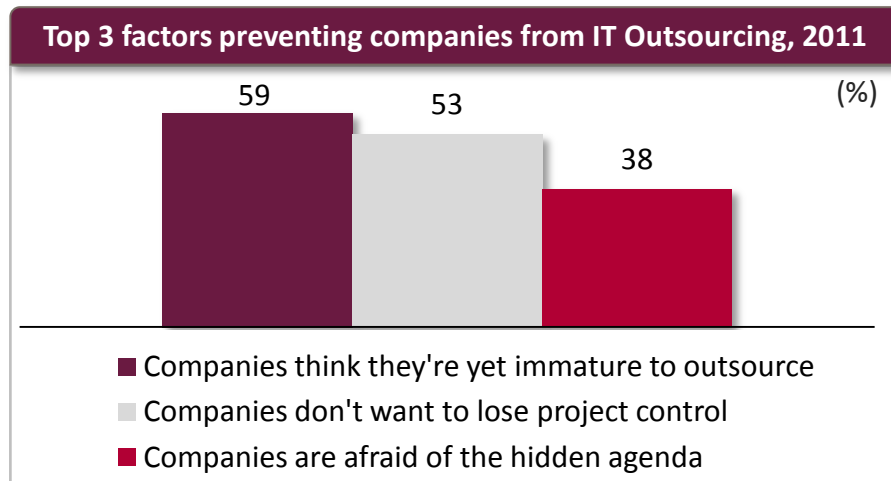
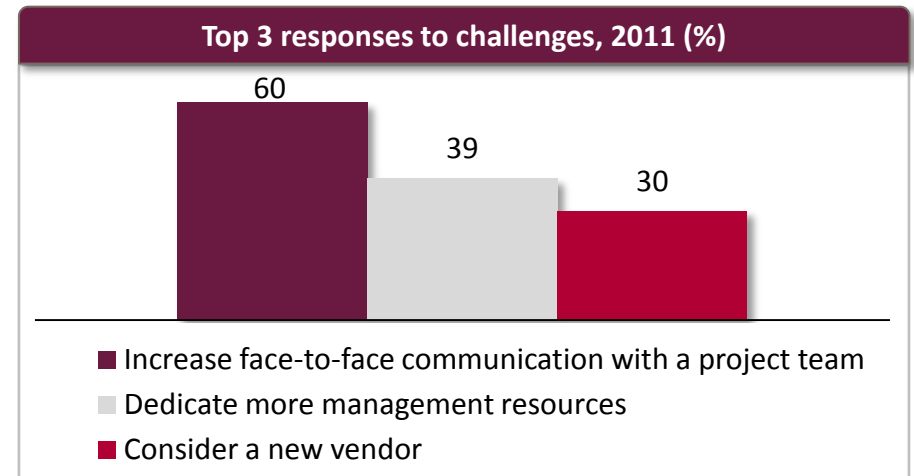
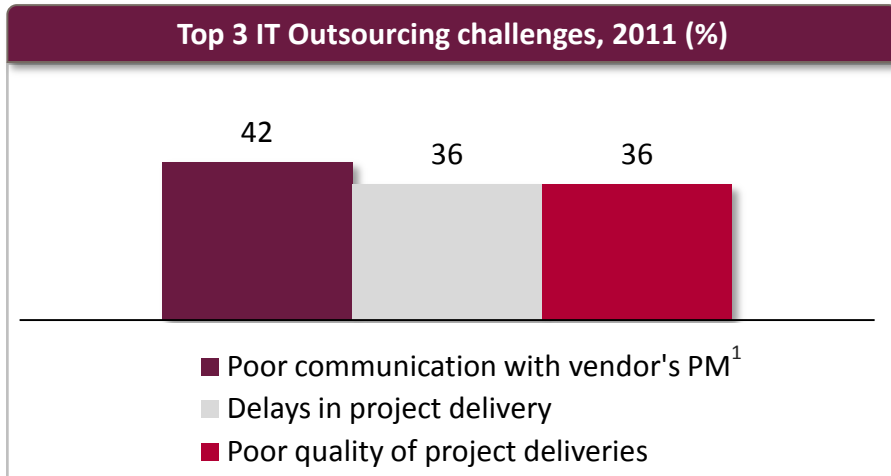
## Language skills, IT talent pool and political stability as the main outsourcing selection criteria



Source: Pan-European IT Outsourcing Intelligence Report, 2011

# The Netherlands – IT Outsourcing intelligence overview (3/5)

## Poor communication as the top challenge for outsourcing

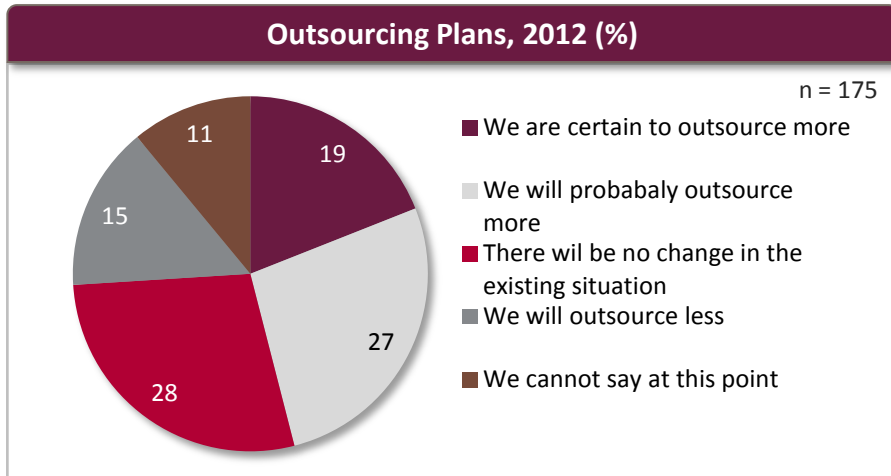


1. Project Manager

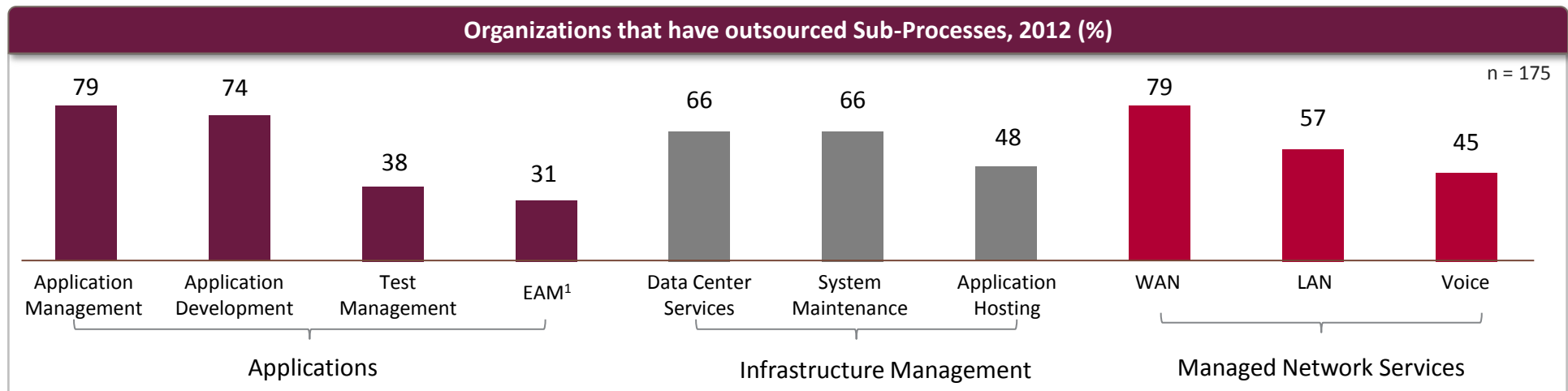
Source: Pan-European IT Outsourcing Intelligence Report, 2011

# The Netherlands – IT Outsourcing intelligence overview (4/5)

Application Management / Development are the sub-processes which are mostly outsourced



- ### Outsourcing Plans and Sub-Processes Outsourced
- Companies in the Netherlands are planning to outsource more in the years to come:
    - Around 27% of companies said that they would probably outsource more
  - Of all the sub-processes outsourced, 79% of the companies are already outsourcing Application Management and more companies plan to do the same in the near future



1. Enterprise Application Management

Source: 2013 Strategic Visions on the Sourcing Market – KPMG, 2012

# The Netherlands – IT Outsourcing market intelligence (5/5)

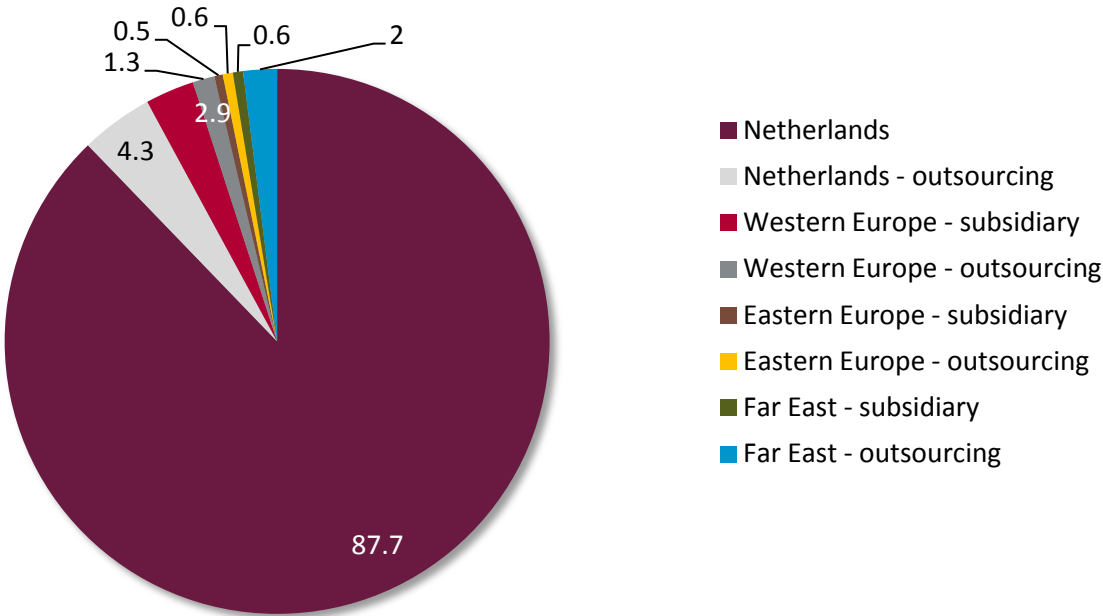
Persisting outsourcing activities, especially in mobile development and cloud solutions

- **Currently, almost 50% of the ICT companies outsource certain tasks and plan to do so within the next year**
  - over 1/3 of the companies have more than 3 years of outsourcing experience
  - **Outsourced teams are relatively small: 1-3 (ca. 50%), 4-8 (ca. 20%), 9-10 (15%)**
  - **The top two factors driving outsourcing activities are the urge to reduce costs and the skills-shortage**
- **Most sought-after skills for outsourced tasks:** Web (58%, e.g. Web 2.0, Java, Microsoft ASP, etc.), Mobile (30%), Enterprise (23%, e.g. J2EE, C#, etc.), SaaS/Cloud (19%), Embedded development (19%)
- Drivers of decisions to outsource: reduce operation costs (63%), **shortage of domestic IT skills and resources (58%)**, focus on core competence (30%), accelerate time to market (25%), improve business development strategy (20%)
- **Significant growth of the outsourced mobile development and cloud solutions** expected to hold, proving the rapid dynamics of outsourcing penetration into the most innovative areas of expertise that require very fast time to market, access to global resources and the ability to meet the rapidly changing market

Source: IT Sourcing Europe (2011); <http://de.slideshare.net/itsourcingeuropa/dutch-ito-intelligence-report-2011>

# The Netherlands – Nearshoring vs. Offshoring

Software Developments, 2010 (%)

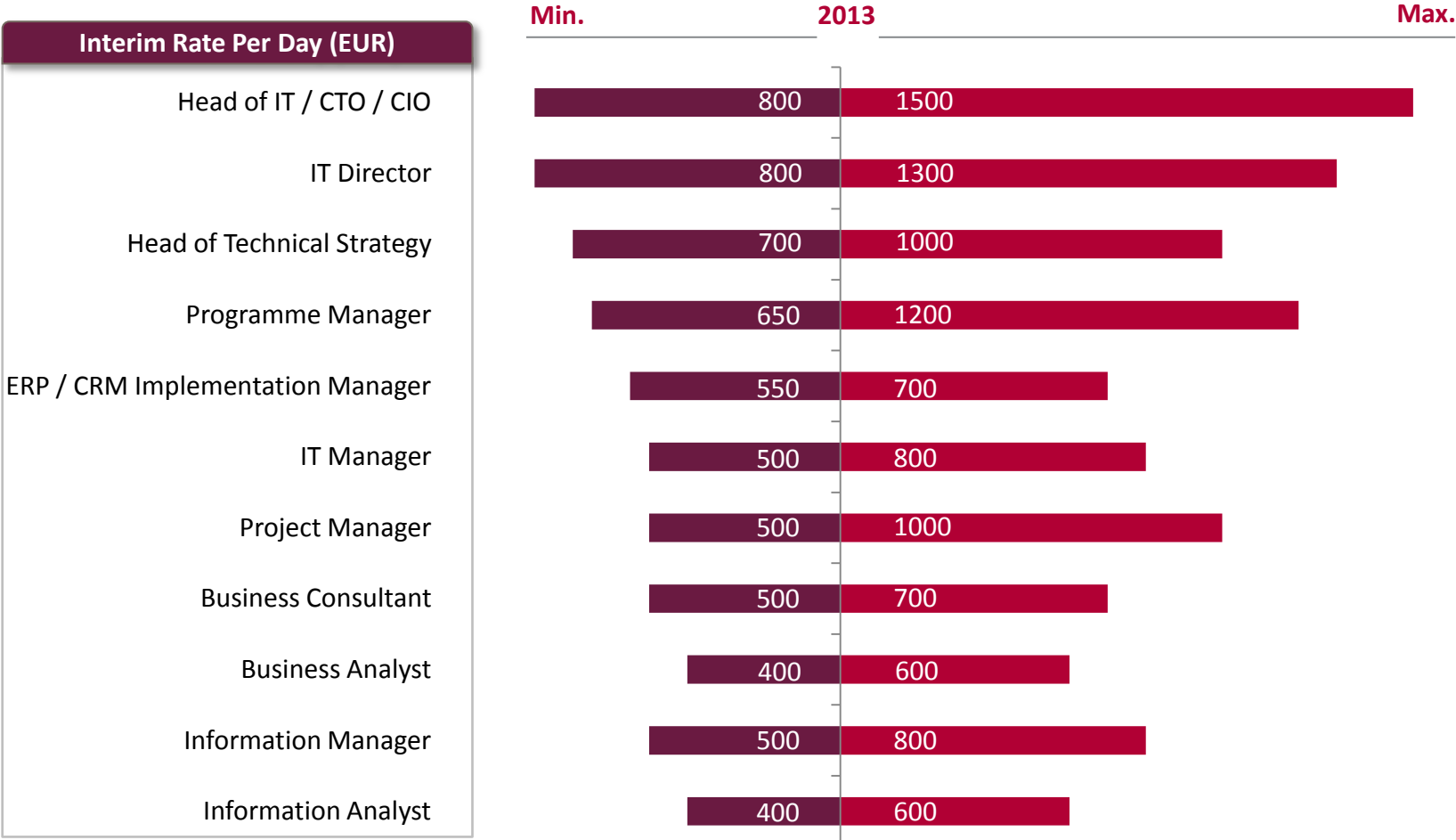


➔ The Netherlands develop 92.1 % of its software  
 ➔ Of the remaining 7.9%, slightly more than half (4.0%) is produced in Dutch subsidiaries abroad  
 ➔ Only 3.9% is outsourced to foreign companies abroad

Source: The Dutch Software Sector – Survey 2010, Oct 2010

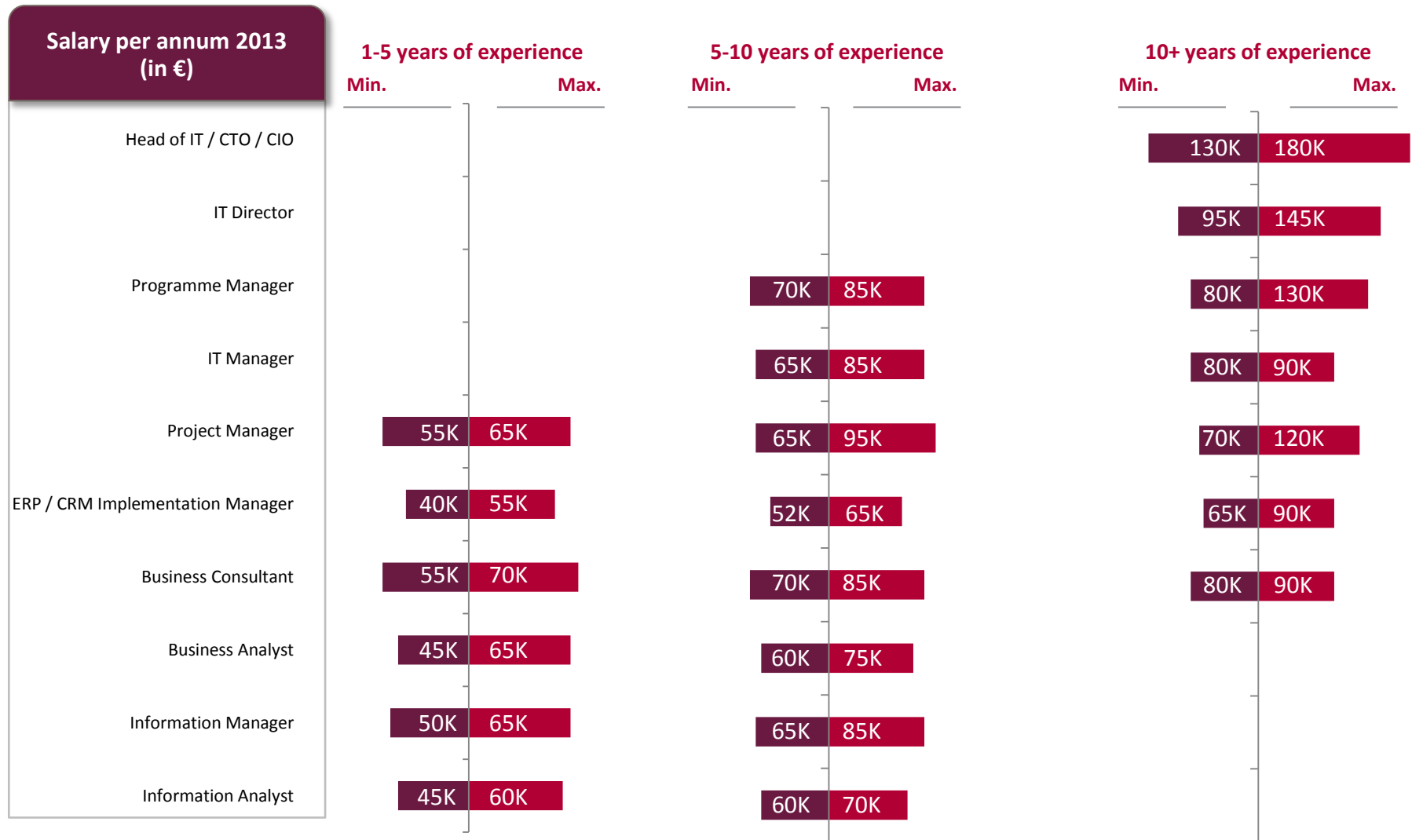
# The Netherlands – Price structure by job category

Stable price / rate ranges in 2013



Source: Robert Walters Global Salary Survey 2013 – The Netherlands

# The Netherlands – Salary structure by job category and years of experience



Source: Robert Walters Global Salary Survey 2013

# The Netherlands – Salary structure in the Software market

Job title	National median salary (annual)
Software Engineer	35,978 €
Software Developer	35,567 €
Senior Software Engineer / Developer / Programmer	48,573 €
Project Manager IT	53,904 €

Source: Payscale.com

# The Netherlands – IT Outsourcing market key trends

Level of outsourcing will remain stable – Large gap of skilled workers to be expected

## Economic Downturn

- Outsourcing is primarily fuelled by the need to respond tactically to continued recessionary economic conditions by cutting current operating cost
- Companies are planning to outsource at the same rate in the near future as well → cost efficiency

## Access to Skill Sets

- **Access to skill and quality** improvement is also a major influential factor
- **The country is going to face an increased level of gap between the available skill set and required skill set**

## Nearshoring & Software Testing

- **Companies seek nearshoring capabilities:** so far, no extensive nearshoring in South-East Europe
  - **First-mover advantage** for SEE IT companies
  - Large potential in the area of **Software Testing** due to the large Dutch Software Development market

## Services Outsourced

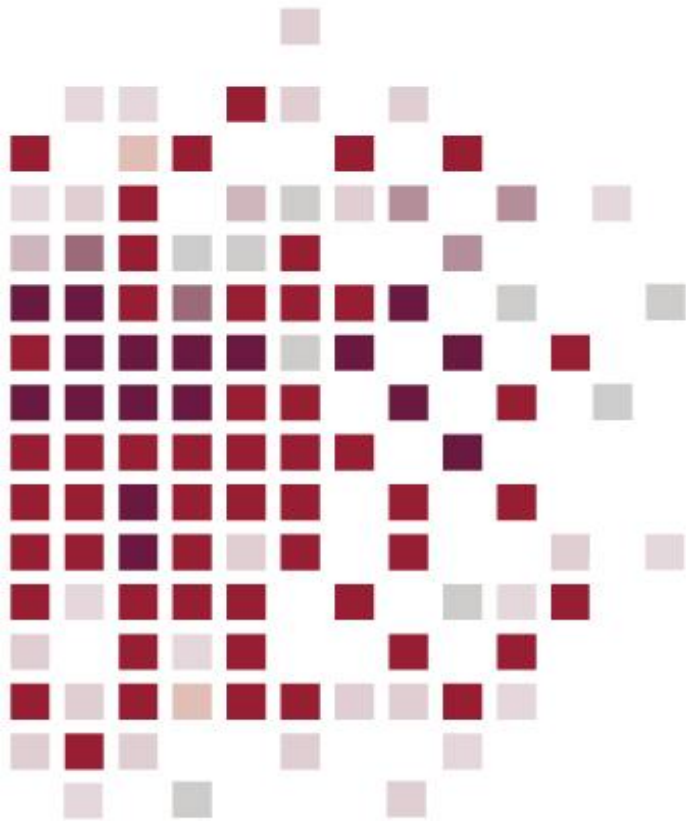
- Companies outsource services like **Information Management, Application Management, Managed Network Services and End-User and Service Management**
- More companies plan to outsource Applications and Infrastructure Management

## Re-balancing Act

- Companies in Netherlands are looking to balance out their outsourcing and in-house portfolio
- **They plan to increase offshore, near-shore and onshore outsourcing contracts; at the same time they also intend to return some aspects of service delivery in-house**

Source: Dutch Strategic Outsourcing Study: 2012

# Agenda



1. ICT Market
2. Software Market
3. IT Services Market
4. IT Outsourcing
5. **Key Success Factors for Exporting**

# Netherlands – Key Success Factors for Exporting

## Marketing & Positioning

- Market segmentation and specialization by: company size (SMEs), technology, verticals, functional areas, business processes
- Ability to communicate customer value and ROI
- Communicating the nearshoring advantage effectively particularly in comparison to offshore destinations such as India or Bangladesh
- Local contacts and partners are very important
- International references
- Online research requires a highly visible & professional website of outsourcing service providers
- Competitive and transparent pricing: bid for small projects (<200,000€)
- Successful “project pilot” as a door-opener
- Focus on specific offshoring services (e.g. Application Management, Application Development, Test Management / Software Testing)

# Netherlands – Key Success Factors for Exporting

## Quality & Processes

- Quality management standards, methodologies and process models: CMMI, ISO, RUP, Agile Methods, SCRUM, Six Sigma, ITIL; CMMI relevant for large-scale clients (e.g. ABN AMRO, KLM)
- Agile methods becoming increasingly important
- Certification: QM, project management, process management, technologies
- Customer education (SMEs): how to use offshoring effectively by applying suitable models and processes
- Knowledge of evaluation, selection and purchasing procedures
- Project management skills: continuous work tracking and reporting
- Compliance with quality, deadlines and budget requirements
- Professional HR management (motivation, skills management) → minimizing fluctuation
- Dutch companies seek an IT talent pool: University alliances and cooperation with academia; skill alignment and sustainable recruitment

# Netherlands – Key Success Factors for Exporting

## Technology & Capabilities

- **Target industries:** IT Software, Telecommunications, Financial Services, Public Sector (in cooperation with Dutch partner)
- **Most sought-after skills:** web, mobile apps, embedded software development, software testing
- Technical responsiveness and adaptability (e.g. mobile technologies)
- Ensuring continuing education and training
- Measures to ensure security and data protection
- Good communication-skills required for collaboration



Thank you!!

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