

## **Netherlands Cybersecurity - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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### **Report description:**

Netherlands Cybersecurity Market Analysis

Netherlands cybersecurity market size in 2026 is estimated at USD 2.55 billion, growing from 2025 value of USD 2.35 billion with 2031 projections showing USD 3.79 billion, growing at 8.3% CAGR over 2026-2031. Growth reflects the country's role as Europe's digital gateway, where internet activity already contributes more than 6% of national GDP and 98% of households enjoy broadband connectivity. Mandatory compliance with the EU NIS2 Directive from Q3 2025 compels thousands of organisations in essential and important sectors to adopt enterprise-grade security frameworks. A sharp rise in state-sponsored attacks including Russia's first recorded attempt to sabotage Dutch industrial control systems re-prioritises operational-technology security investments across energy, maritime and public-service operators. Government commitment is clear: EUR 1.7 billion (USD 2.00 billion) from the Digital Europe programme will be directed to artificial intelligence, data, cloud and cybersecurity projects between 2025 and 2027, catalysing domestic innovation and procurement.

Netherlands Cybersecurity Market Trends and Insights

Surging Cyber-Attacks Across Dutch Critical Infrastructure

A steep escalation in hostile activity reshapes corporate risk perception. Russian state actors attempted direct sabotage of Dutch industrial control systems in 2024, signalling intent to disrupt energy and port operations rather than merely steal data. The Military Intelligence and Security Service now tracks 18 APT groups targeting the energy sector, which hosts roughly 10,000 firms

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and is pivotal to European energy flows. Hacktivist collectives such as NoName orchestrated coordinated DDoS campaigns against more than 20 municipalities in April 2025, broadening the threat to local public services. In response, the Port of Rotterdam partnered with the FERM Foundation to create a nationwide security platform that shares threat data across maritime and petrochemical operators. The gravity of these incidents accelerates spending on operational-technology monitoring tools, incident-response retainers and back-up connectivity to assure resilience.

#### Mandatory Compliance with EU NIS2 Directive by 2025

NIS2 transposition through the Dutch Cybersecurity Act introduces 24-hour incident reporting, management liability and fines up to EUR 10 million (USD 11.78 million) or 2% of global turnover. Ports alone must onboard roughly 170 additional entities into mandatory reporting regimes, a substantial compliance uplift. Insurers and advisory firms observe that board-level accountability is the biggest mindset shift, prompting demand for governance, risk and compliance services. Healthcare providers face parallel pressures to secure medical device networks and patient data, elevating interest in zero-trust architecture and network segmentation. Because enforcement begins in Q3 2025, procurement decisions cluster in 2024-2025, locking in multi-year service contracts and boosting revenue visibility for vendors.

#### Acute Cybersecurity-Talent Shortage

Dutch employers collectively require thousands of additional analysts, architects and incident-response specialists, yet local graduate output lags demand. The Ministry of Defense now recruits cyber reservists to augment national capacity, underscoring skills scarcity across both public and private sectors. ENISA surveys show 89% of Dutch firms expect to hire extra security staff before 2026 to meet NIS2 obligations. Average salaries range from EUR 42,000 (USD 49465.50) for entry roles to EUR 120,000 (USD 141330.00) for senior experts, pushing total cost of ownership for in-house programmes higher. Project delays, escalated wage bills and greater reliance on managed services all stem from this talent deficit, tempering otherwise robust growth projections for the Netherlands cybersecurity market.

Other drivers and restraints analyzed in the detailed report include:

SME Cloud-First Digitization Boosting Security Spending  
Expansion of Dutch Fintech and Open-Banking Ecosystem  
Data-Sovereignty Hesitancy Toward Public Cloud

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Solutions retained a 62.56% share of the Netherlands cybersecurity market in 2025, driven by entrenched demand for firewalls, endpoint protection and identity access governance across 98% broadband-connected households. However, the Netherlands cybersecurity market size for services is projected to expand at an 8.4% CAGR between 2026 and 2031 as firms confront labour shortages and regulatory complexity. Professional services capture projects tied to NIS2 readiness, including gap assessments, tabletop exercises and board awareness sessions, while managed detection and response alleviates 24/7 monitoring burdens for SMEs.

Demand for bundled solutions is evident in Tesorion's portfolio, which layers security monitoring, offensive testing and incident response in a single subscription. Within the technology stack, cloud-security gateways and identity fabrics grow fastest as zero-trust architecture becomes default design guidance from the National Cyber Security Centre. Endpoint and network security continue to post steady renewals within maritime, petrochemical and semiconductor assemblers that rely on deterministic industrial networks. Over the forecast period, services providers with automation, AI analytics and cyber-insurance tie-ins are set

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to capture outsized wallet share, further elevating services' strategic role in the Netherlands cybersecurity market.

Cloud accounted for 65.02% of the Netherlands cybersecurity market in 2025 and is on track for a 10.1% CAGR, reflecting near-ubiquitous fibre coverage and a mature data-centre ecosystem clustered around Amsterdam. The Netherlands cybersecurity market size for cloud-delivered controls in financial services alone is forecast to add more than USD 348 million by 2031 as open-banking regulations demand scalable API monitoring. Yet sovereignty anxieties temper some workloads: ministries and critical-infrastructure operators opt for hybrid or on-premise environments pending Rijkscloud availability.

On-premise security appliances remain mandatory inside many supervisory control and data acquisition networks where latency and deterministic performance are critical, especially at the Port of Rotterdam and national grid assets. Rising energy costs and fresh municipal rules on power-usage effectiveness in Amsterdam encourage migration to efficient cloud architectures, adding nuance to the location debate. Multicloud adoption becomes mainstream as corporates balance cost, latency and jurisdiction requirements across US and EU providers, creating opportunities for posture-management tools that visualise policy gaps across heterogeneous estates.

Netherlands Cybersecurity Market Report is Segmented by Offering (Solutions and Services), Deployment Mode (Cloud and On-Premises), Organization Size (SMEs and Large Enterprises), End-User Vertical (BFSI, Healthcare, IT and Telecommunications, Industrial and Defense, Retail and E-Commerce, Energy and Utilities, Manufacturing, and Others). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

EclecticIQ Fox-IT (NCC Group) ReaQta (IBM) Eye Security Orange Cyberdefense (SecureLink NL) Northwave Cyber Security Zivver Onegini Bitsensor RedSocks Security FRISS Cybersprint Surfcert Awareways Guardey Secura (Synopsys) Hudson Cybertec Radically Open Security NFIR Hunt and Hackett

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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