



- Dutch security cluster
- Businesses, governments, and knowledge institutions
- More business activity, more jobs, and a secure world
- HSD Campus in The Hague is national innovation centre

- Cyber Security
- National Security
- Urban Security
- Critical Infrastructure
- Forensics

‘ By joining forces, we can make a significant contribution to a more secure world and, in addition, increase economic activity and create more jobs. Together we secure the future. ’



280+ partners

FOUNDING PARTNERS



PREMIUM PARTNERS



NETWORK PARTNERS



ALLIANCE PARTNERS





Enhance Security & Economic Development

Facts & Figures of Security Industry in The Netherlands (2016)

Businesses	<ul style="list-style-type: none">▪ 3,900 security companies (406 in region of The Hague)▪ The Hague in particular strong in non-traditional, innovative security jobs (Cyber)
Revenue (€)	<ul style="list-style-type: none">▪ 7.2 billion euros (2.27 billion euros in region of The Hague)▪ 4.8% yearly growth in 2016▪ Cyber security is main area of growth
Jobs	<ul style="list-style-type: none">▪ 61,600 jobs (15,200 in region of The Hague)▪ 1,000 new jobs created in 2016▪ 75,000 jobs expected by 2020



Success Factors for Cluster Development:

Integrated Approach to Security

Triple Helix Cooperation

Knowledge Development in Security

(International) Promotion

High Profile Innovation Projects

Attract Leader Firms (Role Models)

Access to Capital

Attractive Business Climate

Human Capital Development

Breeding Ground for Security Cluster

To develop a strong cluster, HSD provides 'Access to':

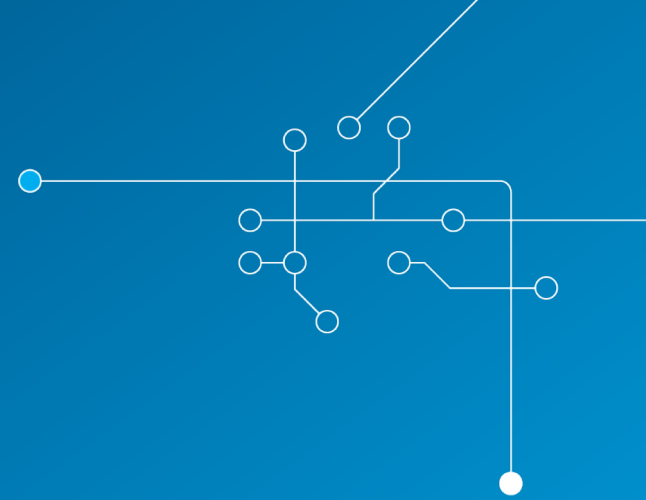
Market

Knowledge

Innovation

Capital

Talent



Exits

Company	Value	Buyer	Year
Security Matters	€ 100 M	Forescout	2018
Redsocks	€ N/A	Bitdefender	2018
Tracksinspector	€ N/A	Magnet Forensics	2018
ITSX	€ N/A	Madison Ghurka	2017
Fox-IT	€ 130 M	NCC	2015
Securelink	€ 100 M+	InvestCorp	2015
Surflight	€ 29 M	Sophos	2015
Authasas	€ 10 M	Microfocus	2015
Collis	€ N/A	UL	2012
Pine	€ N/A	Computest	2015

Dutch Security Market

DUTCH CYBER SECURITY MARKET

Version: October 2018

<p>Identity & Access Management</p>	<p>Cloud & Data Security</p>	<p>Business Forensics</p>	<p>Threat Intelligence</p>	<p>Risk Management Software</p>
<p>Mobile Security</p>	<p>IoT Security</p>	<p>Transaction Security & Blockchain</p>	<p>Authentication Software</p>	<p>Security Education</p>
<p>Security Integrators</p>	<p>Managed Security Providers</p>	<p>Security Consultants</p>	<p>Digital Surveillance</p>	<p>Security & Safety Control</p>
<p>Infrastructure, End Point, Web & Application Security</p>				<p>VALUE CREATION CAPITAL Powered by We build great technology companies HSD Golden Egg check The Hague Security Delta</p>

Investments

Authasas	1,5 mln
Riscure	2,3 mln
Redsocks	..
EclecticIQ	5,5 mln, 11,5 mln
Security Matters	5 mln
Onegini	1,5 mln, 1 mln
Privacy Perfect	..
Hackerone	20 mln
Pandora Intelligence	1 mln
Andrupos	300k, 1,2 mln
Bitsensor	400k
CoBlue Storro	..
Indica	..
ZeroCopter	1,3 mln
Cybersprint	800k
Zivver	1 mln, 12,5 mln
MMOX	..

Dutch Security TechFund

A Fund that invests in early stage (seed) and growth (scale up) companies focused on (Cyber) security and secured technologies

Initiators:

□ **HSD**, with its campus, is home of the leading security cluster in Europe. Businesses, governmental and research institutions from across the country and beyond, work together on the development of products, services and knowledge.

□ **InnovationQuarter**, the regional economic development agency for West Holland, finances innovative and fast-growing companies, assists international companies in establishing their businesses in West Holland and facilitates (international) collaboration between innovative entrepreneurs, knowledge institutes and the government.

□ **TIIN Capital**, a leading Dutch angel investor venture capital firm which invests in Dutch based early stage and SME companies with growth opportunities. TIIN Capital supplies development and growth capital and finances buy-and build projects. It is supported by a large network of about 1.000 angel investors.



www.thehaguesecuritydelta.com

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