



Netherlands Enterprise Agency

# 2017 Report Dutch Tech Fact-Finding Mission to Australia

*Commissioned by the ministry of Foreign Affairs*

*>> Sustainable. Agricultural. Innovative.  
International.*

 **Digital  
Gateway to  
Europe**

*2017 REPORT*

# DUTCH TECH FACT-FINDING MISSION TO AUSTRALIA

*TECH | DATA CENTERS | CLOUD | ONLINE | IT | SAAS | DIGITAL INFRASTRUCTURE | WEB*

*15 - 20 OCTOBER 2017*

# COLOPHON

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# FOREWORD

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Sydney, October 2017

The future is digital. And the future belongs to those who embrace bits and bytes. We were therefore delighted to welcome the Dutch tech & digital infrastructure mission to Australia, exploring the opportunities for yet another Australian-Dutch team up.

In November 2016 a large Dutch trade mission of 95 companies 'bridged the distance' and travelled the almost 17,000 kilometers to Australia in the wake of the State Visit of Their Majesties King Willem-Alexander and Queen Máxima. And in 2017 quite a few visits followed in the opposite direction, by newly found Australian partners, adding to the notoriety of my faraway and rather small country, that measures only two-thirds the size of Tasmania.

My ancestors in the small country on the edge of the North Sea regarded the endless water mass as a gateway to the rest of the planet and they sailed the corners of our earth, even to Australia, already at the dawn of the 17th century. It made the Netherlands one of the hotspots of international trade. This international orientation is still very strong. The first ever transatlantic internet cable connected the U.S. and the Netherlands, adding a new dimension to Dutch "warehousing": from cotton and exotic spices in the 17th century to bits and bytes in our time. In the 21st century the Amsterdam Internet Exchange is the biggest internet gateway of the world.

Indeed, the future is digital. Digital knows no borders and Dutch digital companies are looking for Australian partners in a team up to realise the ambitious Dutch and Australian digital agenda's. We encourage Dutch digital entrepreneurs to explore possibilities in the Australian market and we invite Australian entrepreneurs wholeheartedly to do the same with us.

For information or questions regarding doing business, please don't hesitate to reach out to us.

Willem Cosijn  
Consul-General of the Kingdom of the Netherlands



# PREFACE

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Dear Reader,

Tennessee Williams once said that “Time is the longest distance between two places”. In our digital economy that distance is reduced to only a few milliseconds. Therefore, it’s quite obvious that Australian and Dutch technology driven companies have a lot of opportunities working together.

The countries of Australia and the Netherlands have a long and friendly relationship. The close economic ties that already exist are only being strengthened by Australia’s excellent economic and digital outlook. With Australia’s focus on innovation and the growth of the digital economy, I think we can expect to see significant interest in investments around all sectors over the coming years. The future is digital whether you are in property, agribusiness, government and energy to name a few industries. And with this transformation and transition our confidence grows in the sustained future of our long term trading relationship.

This mission was a fact-finding mission. A broad mission, with many diverse companies and organisations participating. However, all the participants had one thing in common: Technology.

The organisations that participated in this mission were Usabilla, Q Makelaars, NieuweStroom, ibBooster, Human Insight together with the trade associations Dutch Data Center Association and Dutch Hosting Provider Association, representing the companies that make the foundation of the digital economy of the Netherlands. The mission was organised by Handelsroute and Digital Gateway to Europe and was commissioned by the Netherlands Enterprise Agency (RVO.nl) and the Consulate-General of the Netherlands in Sydney.

With this mission report we aim to provide a better insight in the trade opportunities there are between Australia and the Netherlands in the tech industry. For Dutch companies that want to invest in Australia but also for Australian companies that want to invest in the Netherlands and in Europe.

In this report we provide to you the insights of the participants, information and facts about Australia & the Netherlands, insights per organisation that we visited. This combined with links to more information and resources to find out more.

On behalf of the whole mission team we would like to thank all the people and companies that we have met this week and that gave us a very warm welcome and provided us with very good insights. This mission was a great example of the long and friendly relationship.

We would also like to give a special thanks to the consulate general and his team for the enthusiasm and support they’ve given us this special week.

Needless to say is that all participating in this mission are happy to share their knowledge to improve and stimulate trade between the Netherlands and Australia.

Yours truly,

Stijn Grove, Mission Leader  
*Dutch Data Center Association*  
*Digital Gateway to Europe*





# FACTS AUSTRALIA

## HISTORY

New Holland, also known as Nieuw Holland (in Dutch) or Nova Hollandia (in Latin), is a historical European name for mainland Australia. The name was first applied to Australia in 1644 by the Dutch seafarer Abel Tasman. The name came to be applied to the whole "Southern land" or Terra Australis, though the coastline of the continent had still not been fully explored; but after the British settlement in Sydney in 1788 the territory to the east of the continent claimed by Britain was named New South Wales, leaving the western part as New Holland. New Holland continued to be used semi-officially and in popular usage as the name for the whole continent until at least the mid-1850s.

On 22 August 1770, after sailing north along Australia's east coast, James Cook claimed the entire coastline that he had just explored as British territory. Cook first named the land New Wales, but revised it to New South Wales. With the establishment of a settlement at Sydney in 1788, the British solidified its claim to the eastern part of Australia, now officially called New South Wales. In 1804, the British navigator Matthew Flinders proposed the names Terra Australis or Australia for the whole continent

Source: Wikipedia Nov 2017



# FACTS AUSTRALIA

AUSTRALIA	
<b>Capital</b>	Canberra
<b>Largest city</b>	Sydney
<b>National language</b>	English
<b>Demonym</b>	Australian
	Aussie (colloquial)
<b>Government</b>	Federal parliamentary constitutional monarchy
• Monarch	Elizabeth II
• Governor-General	Sir Peter Cosgrove
• Prime Minister	Malcolm Turnbull
• Chief Justice	Susan Kiefel
<b>Legislature</b>	Parliament
• Upper house	Senate
• Lower house	House of Representatives
<b>Independence from the United Kingdom</b>	
• Federation, Constitution	1 January 1901
• Statute of Westminster Adoption Act	9 October 1942 (with effect from 3 September 1939)
• Australia Act	3 March 1986
<b>Area</b>	
• Total	7,692,024 km <sup>2</sup> (2,969,907 sq mi) (6th)
• Water (%)	0.76
<b>Population</b>	
• 2017 estimate	24,697,800 (51st)
• 2016 census	23,401,892[6]
• Density	3.2/km <sup>2</sup> (8.3/sq mi) (236th)
<b>GDP (PPP)</b>	2017 estimate
• Total	\$1.24 trillion[ (19th)
• Per capita	\$49,882 (17th)
<b>GDP (nominal)</b>	2017 estimate
• Total	\$1.39 trillion (13th)
• Per capita	\$56,135 (10th)
<b>Gini (2012)</b>	33.6
	medium · 19th
<b>HDI (2015)</b>	0.939[9]
	very high · 2nd
<b>Currency</b>	Australian dollar (AUD)
<b>Time zone</b>	various (UTC+8 to +10.5)
• Summer (DST)	various (UTC+8 to +11.5)
<b>Date format</b>	dd/mm/yyyy
<b>Drives on the</b>	left
<b>Calling code</b>	61
<b>ISO 3166 code</b>	AU
<b>Internet TLD</b>	.au

Source: Wikipedia Nov 2017

## INTERNET SPEED

Global Rank	Country	Q1 2017 Avg. Mbps	QoQ Change	YoY Change
50	Australia	11.1	9,60%	26,00%

Source: Akamai - The State of the Internet / Q1 2017

## AUSTRALIA VERSUS THE NETHERLANDS

**FACT:** Australia (7,692,024 km<sup>2</sup>) is 206 times as big as the Netherlands (37,354 km<sup>2</sup>).

**FACT:** Australia with 24,697,800 people is 1,44 times as big as the Netherlands with 17,164,800.

### IMPORTS FROM THE NETHERLANDS

A\$2,264 million

### EXPORTS TO THE NETHERLANDS

A\$2,583 million

> <http://dfat.gov.au/trade/resources/Documents/neth.pdf>

# FACTS AUSTRALIA

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## ECONOMY - OVERVIEW:

Following two decades of continuous growth, low unemployment, contained inflation, very low public debt, and a strong and stable financial system, Australia enters 2017 facing a range of growth constraints, principally driven by the sharp fall in global prices of key export commodities. Demand for resources and energy from Asia and especially China has stalled and sharp drops in current prices have impacted growth.

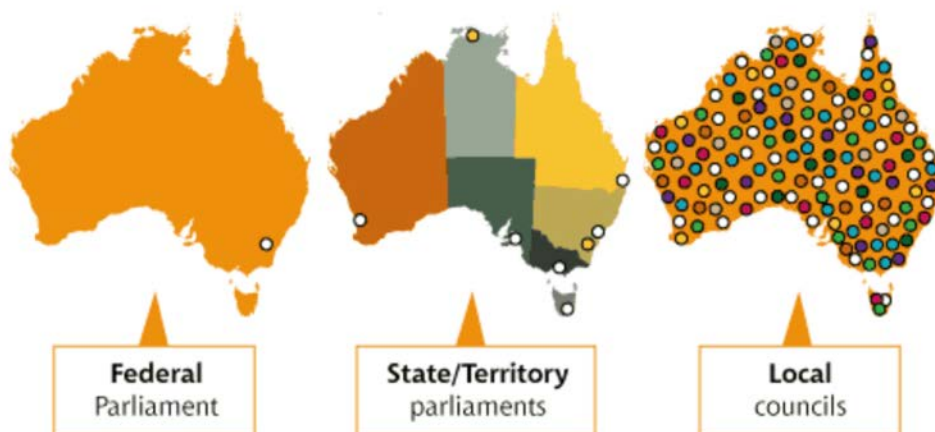
The services sector is the largest part of the Australian economy, accounting for about 70% of GDP and 75% of jobs. Australia was comparatively unaffected by the global financial crisis as the banking system has remained strong and inflation is under control.

Australia benefited from a dramatic surge in its terms of trade in recent years, although this trend has reversed due to falling global commodity prices. Australia is a significant exporter of natural resources, energy, and food. Australia's abundant and diverse natural resources attract high levels of foreign investment and include extensive reserves of coal, iron, copper, gold, natural gas, uranium, and renewable energy sources. A series of major investments, such as the US\$40 billion Gorgon Liquid Natural Gas Project, will significantly expand the resources sector.

Australia is an open market with minimal restrictions on imports of goods and services. The process of opening up has increased productivity, stimulated growth, and made the economy more flexible and dynamic. Australia plays an active role in the WTO, APEC, the G20, and other trade forums. Australia's free trade agreement (FTA) with China entered into force in 2015, adding to existing FTAs with the Republic of Korea, Japan, Chile, Malaysia, New Zealand, Singapore, Thailand, and the US, and a regional FTA with ASEAN and New Zealand. Australia continues to negotiate bilateral agreements with India and Indonesia, as well as larger agreements with its Pacific neighbors and the Gulf Cooperation Council countries, and an Asia-wide Regional Comprehensive Economic Partnership that includes the 10 ASEAN countries and China, Japan, Korea, New Zealand and India.

Source: CIA The World Factbook Nov 2017

## LAW-MAKING BODIES IN AUSTRALIA



## FACTS SYDNEY

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Sydney is the state capital of New South Wales and the most populous city in Australia and Oceania. Located on Australia's east coast, the metropolis surrounds the world's largest natural harbor and sprawls about 70 km (43.5 mi) on its periphery towards the Blue Mountains to the west, Hawkesbury to the north and Macarthur to the south. Sydney is made up of 658 suburbs, 40 local government areas and 15 contiguous regions. Residents of the city are known as "Sydneyiders". As at June 2016 Sydney's estimated population was 5,029,768.

The Sydney area has been inhabited by indigenous Australians for at least 30,000 years. Lieutenant James Cook first landed at Kurnell in 1770, when navigating his way up the east coast of Australia on his ship, HMS Endeavour. It was not until 1788 when the First Fleet, which contained convicts and was led by Captain Arthur Phillip, arrived in Botany Bay to found Sydney as a penal colony, the first European settlement in Australia. Phillip named the city "Sydney" in recognition of Thomas Townshend, 1st Viscount Sydney, Home Secretary in 1788. There are examples of rock art and engravings located in the protected Ku-ring-gai Chase National Park, as well as the Royal National Park.

Since convict transportation ended in the mid-19th century, the city has transformed from a colonial outpost into a major global cultural and economic center. The municipal council of Sydney was incorporated in 1842 and became Australia's first city. Sydney was covered in the colony in 1851 and with it came thousands of people seeking to make money. Sydney became one of the most multicultural cities in the world after the mass migration following the second World War. According to the 2011 census, more than 250 different languages were spoken in Sydney and about 40 percent of residents spoke a language other than English at home. Furthermore, 36 percent of the population reported having been born overseas.

Despite being one of the most expensive cities in the world, the 2014 Mercer Quality of Living Survey ranks Sydney tenth in the world in terms of quality of living, making it one of the most livable cities. It is classified as an Alpha World City by Globalization and World Cities Research Network, indicating its influence in the region and throughout the world. Ranked eleventh in the world for economic opportunity, Sydney has an advanced market economy with strengths in finance, manufacturing and tourism. There is a significant concentration of foreign banks and multinational corporations in Sydney and the city is promoted as one of Asia Pacific's leading financial hubs. Established in 1850, the University of Sydney is Australia's first university and is regarded as one of the world's leading universities.

Source: Wikipedia Nov 2017

Indices Difference
Consumer Prices in Netherlands are 3.80% <b>lower</b> than in Australia
Consumer Prices Including Rent in Netherlands are 7.41% <b>lower</b> than in Australia
Rent Prices in Netherlands are 15.19% <b>lower</b> than in Australia
Restaurant Prices in Netherlands are 12.09% <b>higher</b> than in Australia
Groceries Prices in Netherlands are 19.93% <b>lower</b> than in Australia
Local Purchasing Power in Netherlands is 11.84% <b>lower</b> than in Australia

Source: Numbeo

# FACTS SYDNEY

SYDNEY	
<b>Population</b>	5,029,768 (2016) (1st)
• Density	400/km2 (1,000/sq mi) (2015)
<b>Established</b>	26 January 1788
<b>Area</b>	12,367.7 km2 (4,775.2 sq mi)(GCCSA)
<b>Time zone</b>	AEST (UTC+10)
• Summer (DST)	AEDT (UTC+11)
<b>Location</b>	877 km (545 mi) NE of Melbourne
	923 km (574 mi) S of Brisbane
	287 km (178 mi) NE of Canberra
	3,936 km (2,446 mi) E of Perth
	1,404 km (872 mi) E of Adelaide
<b>LGA(s)</b>	various (31)
<b>County</b>	Cumberland
<b>State electorate(s)</b>	various (49)
<b>Federal Division(s)</b>	various (24)

Source: Wikipedia Nov 2017

SYDNEY		
Climate		
Mean max temp	Mean min temp	Annual rainfall
22.5 °C	14.5 °C	1,222.7 mm
73 °F	58 °F	48.1 in

Source: Wikipedia Nov 2017

## SYDNEY STARTUP SCENE

- About 1000 – 1200 new startups every year
- Sydney 16th on the '20 best startup cities Ecosystem Index'.
- Sydney, startup capital of Asia
- Since 2015 extra startups support by the government



## CONTACTS IN AUSTRALIA

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Netherlands in Australia: In addition to the Netherlands's embassy in Canberra, the Netherlands is represented by 6 consulates in Australia: Sydney, Adelaide, Brisbane, Hobart, Melbourne, and Perth.

### DUTCH EMBASSY CANBERRA

Ambassador Erica Schouten  
Address 120 Empire Circuit  
Yarralumla ACT 2600  
Canberra  
Phone +61262209400  
Email [can@minbuza.nl](mailto:can@minbuza.nl)

### DUTCH CONSULATE GENERAL SYDNEY

Consul Willem N. Cosijn  
Address Westfield Tower 2  
Level 23  
101 Grafton Street corner of Grosvenor Street Bondi Junction  
NSW 2022 Sydney  
Phone +61293876644  
Email [syd@minbuza.nl](mailto:syd@minbuza.nl)

> <http://hollandhubaustralia.com.au/>

### VISA

Visit <https://www.border.gov.au> for more information about Visa. For this mission the eVisitor (subclass 651) visa was relevant. The eVisitor visa is a free visa, which allows individuals to visit Australia as a tourist or to carry out business visitor activities such as making general business or employment enquiries, negotiations or participating in a conference. Maximum stay is 3 months

### CONTACT AUSTRADE

If you are interested in importing goods and services from Australia to the Netherlands and require further information and assistance, please contact the Austrade Office in Frankfurt.

> <http://netherlands.embassy.gov.au/thag/trade.html>

More information can be found on: <https://www.netherlandsworldwide.nl/countries/australia>







## MISSION REPORT

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From 15 to the 20<sup>th</sup> of October 2017 we visited Sydney, Australia on a Fact-finding mission. We started Sunday evening with a meet & greet dinner and on Monday the program started. A program that intensified during the course of the week because of the long travel time to Australia. All appointments were scheduled in the CBG area, the Sydney Central Business District which is the main commercial center of Sydney.

From Monday to Thursday we had a fixed program with company visits and networking events. On Friday we had no program set as this day was reserved for follow up meetings. The following report is a day to day report of all the activities. Links to further information are provided below each activity.

### SUNDAY 15 OCT

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#### **18.00**      **Meet & greet dinner**

*Location: The Butler 123 Victoria Street, Potts Point*



# MONDAY 16 OCT

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09.00 - 11.00

Dutch Consulate General Sydney



Breakfast meeting with Consulate General at Spaces with Nicoline van Cann, Senior Trade Officer at Consulate-General of the Netherlands. She presented an overview on the ins and outs of doing business in Australia and Sydney.

1. Market overview
2. Australian government programs
3. Support from the CG

*Location: Spaces, 111 Flinders St, Surry Hills NSW.*

> <http://hollandhubaustralia.com.au/>

12.00 – 15.00

LUNCH

*Location: Manly beach with ferry*

16.00-17.00

Haymarket incubator

We visited Haymarket incubator in the Sydney's China town area. We were welcomed by Haymarket's Dutch General Manager Duco van Breemen. Haymarket HQ is Australia's first not-for profit startup hub, supporting entrepreneurs to connect to Asia. It offers startups access to co-working space, mentors and investors, and a network of like-minded entrepreneurs across Asia-Pacific. Haymarket HQ is supported by the State government (Jobs for NSW) and founded by Brad Chan.

The majority of their startups are globally active, but recognise Asia as an important region for their business now and/or in the future. It makes sense for Australian businesses to focus on Asia. The majority of all future economic growth will come from Asia and Australian businesses are well-placed to capitalise on its burgeoning middle class. Asia has been Australia's largest trading partner for a long time, but will become even more important in the near-future:

- 50% of all Australia's trade is with Asia
- Two-thirds of the world's middle class will be in Asia by 2030
- By 2030 China is forecast to account for 22 percent of global middle-class spending, 3 times greater than the US share.
- Australia is home to a large Asia-capable talent pool. 17% of Australian's identify themselves as having Asian origins.
- Asia makes up 70% of all Australia's exports, the majority going towards China.

We met a variety of companies, from a teddy bear firm with a smash hit product in China to a company developing sports helmets with video camera's. All very much focused on the Asian market.

> <http://www.haymarkethq.com>

> <https://nl.linkedin.com/in/ducovanbreemen>

> <http://www.abc.net.au/news/2014-05-15/tourists-travel-to-tasmania-in-search-of-purple-lavender-bear/5455820>

## MONDAY 16 OCT

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18.00

### Consul General meeting - BBQ network event at CG OR

We were invited at the at the official residence of the Consul General Willem Cosijn for a BBQ network event. Some 30 Australian and Dutch companies visited the event. After a warm welcome by the Consul General and his wife, we were treated to a real Australian BBQ.

*Guest list:*

Paul Budde	Managing Director Paul Budde Consulting
Maarten Platenkamp	Business Games
Gerben van Velthuisen	Head of Corporate Strategy Optiver
Matt McInnes	Lynxx
Radinck van Vollenhoven	StocardApp
Mark van Rijmenam	Dataflog
Ton Dijkgraaf	Consultant IoT & Smart Cities KPMG
Michael Hahn	Cadac Group
Ben Boyter	Searchcode
Lisa en Erik Polsek	Ray White



# TUESDAY 17 OCT

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**09.00**      **Program start - Lobby**

*Location: HOTEL Quest Potts Point - 15 Springfield Avenue, Potts Point*

**10.00-11.00**      **NFIA Singapore**

## ***Netherlands Foreign Investment Agency***

We met with Adeline Tan from the NFIA, the Netherlands Foreign Investment Agency. Whether you're considering locating in the Netherlands or have existing operations here, the NFIA is prepared to assist your company at every stage of establishing or expanding operations in the Netherlands.

Free, confidential services offered by NFIA include: organizing fact-finding missions; arranging meetings with relevant partners; and providing personalized guidance and counsel on tax, government and permit procedures, location options and business solutions.

An operational unit of the Dutch Ministry of Economic Affairs, the NFIA is your first port of call, connecting you with a broad network of business partners, regional economic development organizations and government institutions to facilitate your international expansion.

Throughout the years, NFIA has supported thousands of companies from all over the world, including Bombardier, Cisco, Danone, Fujifilm, Huawei, LG Electronics, SABIC, RWE and Tata Consulting Services, to successfully establish their business in the Netherlands.

Adeline explained more about how she tries to attract Australian companies to incorporate in the Netherlands and about the activities in the Asia Pacific region.

*Location: Presto coffee 50 Pitt street (Pitt str x Bridge str)*

> <https://investinholland.com/>

**11.00-12.00**      **Infigen Energy**



Visit to the control center at the head office of Infigen. Infigen Energy (Infigen) is a business actively participating in the Australian energy market. It is a developer, owner and operator of generation assets (mainly wind farms) delivering energy solutions to Australian businesses and large retailers.

Infigen has 557 MW of installed generation capacity across New South Wales, South Australia and Western Australia with a further 113 MW under construction in New South Wales. It sells the electricity and Large-scale Generation Certificates through a combination of medium and long term contracts and through the spot market.

## TUESDAY 17 OCT

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Infigen is looking to diversify and expand its customer base and will grow its generation portfolio in response to strong price and investment signals. In the short term it is targeting expansion in New South Wales and entry into the Victorian and Queensland regions of the National Electricity Market. Infigen will seek to do this through sales of electricity and LGCs and construction of assets within its development pipeline in those regions.

Infigen's analyst explained how the energy market works showing live data feeds with market and assets information, followed by a Q&A. Also invited was the energy markets team to join and discuss the Nieuwe Stroom business model.

This very fruitful meeting gave insights in the Australian energy market, that is under pressure with rising energy prices for consumers and increasing concerns on how to meet future demand with current available assets.

*Location: Level 17, 56 Pitt Street*

> <https://www.infigenenergy.com>

**12.00-13.00 LUNCH**

**14.00-16.00 Cube capital**



Company visit Cube capital. Cube Capital advises middle market technology companies and wholesale investors on investment banking transactions. Presentation by Cube Capital Partner Hani Iskander on investments and M&A in digital market, energy market and real estate.

This resulted in a lively conversation between the mission team and Cube about the chances of doing business in Australia and with Australian companies.

*Location: Level 25, One International Towers Sydney, 100 Barangaroo Avenue, Barangaroo*

> <https://cube.capital/>

**17.30-19.30 Spark festival event**

**spark  
festival  
sydney**



Spark Festival is a ten day program of events and activities which showcases, supports and strengthens the vibrant startup and innovation ecosystem of Sydney, and all of NSW.

We visited a open meetup with startups presenting themselves to the audience.

*Location: Ultimo, 525 Harris street*

> <http://sparkfestival.co/>

## WEDNESDAY 18 OCT

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### 07.30 Program start

*Location: 15 Springfield Avenue, Potts Point*

A network event especially arranged by the Northern Sydney Innovation Network for this mission. Sound hound and other innovative companies presented themselves. NSI invited some companies related to the delegation for a meet and greet. Main objectives were: To gain a better understanding of the chances for Dutch companies on the Australian market? To explore partnerships with the attending Australian companies. To explore the opportunities for the Australian companies to expand to The Netherlands?

*Location: Level 7, 100 Pacific Highway, North Sydney NSW 2060*

### 12.00-13.00 LUNCH

### 13.00-14.00 Company visit Telstra



Meeting with Christopher Smith (Executive Director Business Technology Services Telstra)

Telstra is Australia's leading telecommunications and technology company, offering a full range of communications services and competing in all telecommunications markets.

In Australia they provide 17.4 million mobile services, 6.8 million fixed voice services and 3.5 million retail fixed broadband services.

During this meeting we discussed: The Australian IT market in general. The challenges Australia is currently facing regarding internet access. Telstra provides fiber to the curb and a copper last mile. This imposes challenges on the available internet access speeds. We also discussed the National Broadband Network, the roll out is not going as fast as anticipated. The NBN was established in 2009 to design, build and operate Australia's new high-speed, wholesale local access broadband network. Underpinned by a purpose to connect Australia and bridge the digital divide, NBN's key objective is to ensure that all Australians have access to fast broadband as soon as possible, at cost effective prices, and at least cost.

We also discussed Telstra's own transformation process and how this impacts their employees, the search and retention of talent and the creation a future proof workforce.

*Location: 400 George Street, Sydney*

> <https://www.telstra.com.au/>



## WEDNESDAY 18 OCT

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15.30-17.00 Company visit OzHosting



Talked to CEO, Doug Endersbee.

OzHosting is a (web)hosting company. Employing 40 people split over 3 locations' Sydney, The Philippines and Tokyo (Japan). OzHosting uses an indirect approach of the market. Partners of OzHosting are mostly IT service companies or managed service providers. The Australian business market is a SME market. Where working local for local seems like the right thing to do. OzHosting offers webhosting services like domainregistration, mail and website functionality. But also offers application hosting services and workplace related products like Office 365 and rushfiles backup and files sharing. They support 3 types of mailsolutions: Hosted Exchange, Office 365 and a third solution that is quite basic regarding its functionality but offers a very stable solution to customers. The platform of choice for OzHosting is Odin (former Parallels, now part of Ingram Micro). Odin is a frequently used platform in this region.

The Australian market for hosting services is quite limited. A 3-year-old study of ODIN estimated a total revenue on hosting services of 900 million Australian Dollar. This equals roughly 650 to 700 million Euro. A conservative estimate for 2016 would then be 900 million Euro. Australia has 23 million inhabitants. Compared to this, the Netherlands has 17 million inhabitants and according to a recent study of the Dutch Hosting Provider Association in cooperation with research agency The METISfiles, the Dutch market for hosting services is 1.5 billion Euro.

With the lack of a large midmarket and the fairly small enterprise segment, the Australian business market differs significantly from the Dutch business market. The number of companies providing hosting services is estimated at a maximum of 50! The Dutch market comprises at least 1,500 companies active in hosting. However, 75% of these companies employ just a single person. Australia has a small number of large hosting companies. One of them is Melbourne IT, an IT Services company that was recently acquired by another IT firm. Consolidation in the hosting sector has been going on for a number of years now. As a consequence, the number of active hosters in the Australian market has become relatively small.



## WEDNESDAY 18 OCT

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There seems to be room in this market for specialized hosting companies. Acquisition of existing companies looks like the best way to enter the Australian market. Australian end users have a strong preference for local IT suppliers.

OzHosting is run by 2 business partners. Doug Endersbee focuses on the commercial side of the business while his partner, who lives and works in Tokyo focusses on the technical aspects of the business. The Australian labor market shows the same challenges as in the Netherlands; availability of good technicians is very limited. Availability of good technicians is very limited. OzHosting solves this problem by contracting people in the Philippines and Japan. Future availability of qualified technician will decline further, according to OzHosting. Universities in Australia are expensive for Australians with tuition fees increasing as a result of the large influx of Chinese students.

OzHosting foresees no drastic changes. Growth is considerable with a year on year growth ratio of 10% or more. Acquisition of another companies is an option. Acquisition is not pursued at this moment. Doug Endersbee does not rule out being the target of acquisition by another company. Everything is possible in this consolidating hosting market.

When confronted with the remark that the available bandwidth in Australia is very very limited for both consumers and companies Doug Endersbee stated that although it is a highly undesired situation, it is applicable to everyone in this country. Policies by past and current governments have led to inertia and delays. Connectivity is not given the desired priority. However he does not expect the connectivity issues to be resolved any time soon.

In their own words: Established in 1997, OzHosting.com is a pioneer of Australia's Cloud hosting market. It continues the tradition of serving Australian businesses with an Australian data center that complies with world-class standards for speed, reliability and security.

*Level 5, 104 Commonwealth Street, Surry Hills NSW 2010, Australia*

> [www.OzHosting.com](http://www.OzHosting.com)

### **17.00            Network drinks at Beresford hotel.**

*Location: Beresford Hotel, 354 Bourke Street, Surry Hills, 2010*

# THURSDAY 19 OCT

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08.00 - 09.30

Networking breakfast IAB community



The Interactive Advertising Bureau (IAB) Limited is the peak trade association for online advertising in Australia and was incorporated in July 2010. As one of 44 IAB offices globally, and with a rapidly growing membership, IAB Australia's principal objective is to support and enable the media and marketing industry to thrive in the digital economy.

In his presentation CEO Vijay Solanki gave an overview of the Australian Digital Media and digital marketing industry: How to approach the Australian market as a Dutch company. Cultural differences in communication approach. 19 million Australians are online every month. Digital advertising spending is now 50% of all advertisement spending. Of which 33% is video and 50% is mobile.

Internet access remains a problem. NBN - National Broadband Network initiative is a good start but compared to other regions it is still very slow. As a result it slows down the digital transformation in Australia.

*Location: Google, 48 Pirrama Rd, Pyrmont NSW 2009*

- > IAB - <https://www.iabaustralia.com.au/>
- > Vijay Solanki - <https://www.linkedin.com/in/vijaysolanki/>
- > NBNCO - <https://www.nbnco.com.au/>



RealEstate.com.au is Australia's number 1 real estate website but also broadening its focus on lifestyle. It is comparable with the Dutch real estate website Funda.nl. Realestate.com.au is owned and operated by ASX-listed REA Group Ltd. A multinational digital advertising company specializing in property.

Listed on the Australian Securities Exchange (ASX:REA), they operate Australia's leading residential, commercial and share property websites, realestate.com.au, realcommercial.com.au and flatmates.com.au, Chinese property site myfun.com, and iProperty Group which owns a number of leading property portals in Asia. They also have significant shareholdings in Move, Inc. in the United States and PropTiger in India. Everything they do is driven by their mission to 'change the way the world experiences property' - from product innovation to international investments.

After the company introduction, a discussion about the Australian real estate market followed. The real estate market characteristics include short supply and high demand, similar as in the Netherlands. We also discussed ways to attract customers. RealEstates.com.au has taken over Flatmates: [flatmates.com.au](https://www.flatmates.com.au/). Which was bought to focus on Millennials.

*Location: Google, 48 Pirrama Rd, Pyrmont NSW 2009*

- > <https://www.realestate.com.au/buy>

THURSDAY 19 OCT



We met with IAG Insurances. IAG is the name behind some of the most trusted and respected insurance brands in the region.

IAG's businesses underwrite over \$11 billion of premium per annum, selling insurance under many leading brands including NRMA Insurance, CGU, SGIO, SGIC, Swann Insurance and WFI (Australia); NZI, State, AMI and Lumley Insurance (New Zealand); Safety and NZI (Thailand); AAA Assurance (Vietnam); and Asuransi Parolamas (Indonesia). IAG also has interests in general insurance joint ventures in Malaysia and India. Standard & Poor's has assigned a 'Very Strong' Insurer Financial Strength Rating of 'AA-' to the Group's core operating subsidiaries.

We discussed the digital transformation process of IAG. Including a program named the Satellite project. Which allows for sandbox initiatives for the insurance market.

*Location: Google, 48 Pirrama Rd, Pyrmont NSW 2009*

- > <https://www.iag.com.au/>
- > <https://www.iag.com.au/satellite>



10.30 - 11.30      CICADA innovation, Arjan Goudsblom



Cicada provides long-term tailored business support to technical founders. Cicada selects startups that are working on scalable deep technologies to join their portfolio and gain access to their full-time business mentors, community of entrepreneurs, investor and industry network as well as their facilities comprising office, lab and event space. They take up to five percent equity in the business as a mechanism for aligning interests with the entrepreneurs' and offer subsidised rent for office space.

*Location: 4 Cornwallis St, Eveleigh NSW 2015*

- > Cicada - <http://cicadainnovations.com/>
- > Arjan Goudsblom [linkedin.com/in/arjangoudsblom](https://www.linkedin.com/in/arjangoudsblom)



## THURSDAY 19 OCT

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12.00 - 13.00 LUNCH

14.30 - 16.00 Company visit Austrade presentation



**Australian Government**

**Australian Trade and Investment Commission**



Australian Trade and Investment Commission (Austrade) contributes to Australia's economic prosperity by helping Australian businesses, education institutions, tourism operators, governments and provides coordinated government assistance to promote, attract and facilitate productive foreign direct investment (FDI) into Australia.

We met with Annika Barton, Adviser Advanced Manufacturing, Services and Technology. We discussed:

- Austrade's role
- Austrade services for investors, priority sectors, ICT
- Starting a business in Australia
- Government support for foreign direct investment

Doing business in the Netherlands:

[austrade.gov.au/Australian/Export/Export-markets/Countries/Netherlands/Market-profile](https://austrade.gov.au/Australian/Export/Export-markets/Countries/Netherlands/Market-profile)

*Location: AON building, level 23, 201 Kent Street, Sydney.*

> Austrade - <https://www.austrade.gov.au/>

### 18.30 Debriefing dinner

Thursday evening the collective program ended with a debriefing dinner. The overall week was viewed very positive contributing to a better understanding of the Australian market and making valuable connections for future expansion into the Australian market.



## MISSION FINDINGS & NEXT STEPS

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### **Sebastian Hamers**      **Human Insight**

*1. What was the most surprising thing you have encountered?*

Impressed by the business culture and openness to do business.

*2. What are the main takeaways for you?*

Business in Australia is focussed in an around Sydney and Melbourne. I expected it to be a more diverse.

*3. Have you found opportunities that you will follow up on?*

Already have one client in Australia and found customers to plan a follow up with which we are chasing as we speak.

### **Richard den Buitelaar**    **Q Makelaars**

*1. What was the most surprising thing you have encountered?*

China's influence on the Australian economy. This influence is enormous and I still don't know if it's a good or a bad thing on the long term.

*2. What are the main takeaways for you?*

Australia (Sydney) has so much opportunities for entrepreneurs. I wanted to discover if I could live and work in Australia. The answer is definitely 'yes'. I am even more enthusiastic then I was before our mission.

*3. Have you found opportunities that you will follow up on?*

Yes. I have seen real estate solutions we already use in The Netherlands which I can bring to the market in Australia. Otherwise I have experienced and interviewed actors in a mature rental market, something we will develop in The Netherlands the next years.

### **Sandra Brandenburg**    **Handelsroute**

*1. What was the most surprising thing you have encountered?*

I felt that many Australian people/companies we have talked to were struggling to fully leverage the changes and opportunities digital technologies offer. This of course is great news for Dutch companies.

*2. What are the main takeaways for you?*

It was quite easy to make a connection with Australians. You have to come up with a solid strategy to deal with the time difference and distance. Even more than I anticipated. Finding good local partners/resellers, probably is the most viable solution for most companies that consider to enter the Australian market.

*3. Have you found opportunities that you will follow up on?*

Yes, I think with a solid strategy regarding time difference and distance, there are a lot of opportunities for IT-companies, e-commerce, cloud and digital agencies, especially when the digital infrastructure roll out will improve the connectivity.

### **Stijn Grove**                      **Dutch Datacenter Association / Digital Gateway to Europe**

*1. What was the most surprising thing you have encountered?*

The easiness you can blend in and do business in Australia combined with the sheer beauty that the city of Sydney has. One of the major cities of the world that combines skyscrapers with large parks, old buildings, many waterfronts, beautiful beaches and a lot of coffee bars.

*2. What are the main takeaways for you?*

Australia main economic activities are centralized in Sydney, Melbourne and Brisbane. The size of (SME) companies is comparable to the Dutch market. Digital transformation, innovation and start ups are top of mind and have been a real focus the last 3 years. Australia can be a great bridgehead to expand towards Asia and there are many Asian companies present in Sydney that can be a potential

## MISSION FINDINGS & NEXT STEPS

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partner. Were Indonesia and the Philippines are regarded as the major growth potentials.

*3. Have you found opportunities that you will follow up on?*

In terms of Digital Infrastructure companies, I think that the data center supplying industry and Dutch Cloud sector can be successful. Next to that for companies looking to expand in Europe, and especially with Brexit, the Netherlands is a real opportunity for Australian companies to be successful in business.

**Ruud Alaerds**                      **Stichting DHPA**

*1. What was the most surprising thing you have encountered?*

Australia is a country that far away but also that close to us when it comes to being a modern society which really looks very similar to ours. The differences are there. At first they occur or seem to be small. But looking a bit deeper, there really are some big differences. The lack of bandwidth for Internet use is one of the big surprises. It really asthones me too how strong the Chinese influence is on the Australian local economy.

*2. What are the main takeaways for you?*

Australia is an enourmously large country. It's world of its own. But the orientation on the south east of Asia is strong. And comparing it to our country is in many way snot a realistic thing to do. The history, the culture, and most certainly the geographical situation of Australia makes it incomparable with Europe and especially the Netherlands. This region depends heavily on it's connection with Asia. And shares a history that is very much a commonwealth one. The differences in focus of the IT industry does make it an interesting region for European IT companies to expand to. The distance isn't that big really as it looks like when you travel to this region.

*3. Have you found opportunities that you will follow up on?*

We will follow up on building a better relation between the local Internet sector here and in Australia. We only took a first step in getting to know the country and its local market. There's is still much to be discovered here. But the outlook is a promisingone.

**Remko ten Barge**                      **NieuweStroom**

*1. What was the most surprising thing you have encountered?*

Reducing electricity costs is front page news in the newspapers.

Risk premium for fixed prices is 20-40%, which can be saved by companies by paying the actual dynamic price for electricity

*2. What are the main takeaways for you?*

- 5-minute market (allocation) and 30-minute spot market prices
- spot market is highly volatile; risk premium is substantial (20-40%)
- no imbalance market
- no energy taxes
- many SME companies (our core customers)
- willingness to reduce of energy costs, high impact of P&L of SME

*3. Have you found opportunities that you will follow up on?*

Yes, I will certainly stay in touch with a number of companies that we have spoken and that I got introduced to.

**Wouter Koch**                      **Usabilla**

*1. What was the most surprising thing you have encountered?*

I felt that the Australian companies are really willing to change and adapt to the fast-changing Tech environment.

## MISSION FINDINGS & NEXT STEPS

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2. *What are the main takeaways for you?*

1. Huge potential for Dutch SaaS companies that deliver high tech software;
2. Willingness to adapt means investing opportunities;
3. Big budget for purchasing software;
3. *Have you found opportunities that you will follow up on?*

Yes, we are working with one organisation we met during the mission.

### Conclusion

Australia is very pleasant country to do business due to the open and welcoming Australian business culture. It is a stable country and has a strong and thriving economy with 25+ years of continuous economic growth.

Biggest downsides of doing business in Australia is the distance and time difference, which makes expansion from Europe hard to manage. However, the increased focus on cloud services will gradually offer more opportunities.

Overall we feel that the mature Dutch Digital infrastructure has offered the Dutch IT/cloud ecosystem such a competitive advantage that Dutch services and products might easily fill the gaps in the Australian online market. Challenges faced by companies entering the Australian market from Europe will probably not stem from product or service issues but will be more marketing and sales related. A local presence or distributor is definitely advantageous.

Current growth of online products and services is held back by the available connectivity. Dutch companies that are contemplating expansion into the region should monitor the development of the National Broadband Initiative, which should improve connectivity over the coming years.

Companies depending on the availability of energy should be cautious. Energy prices are already substantially higher than in Europe and the energy supply will be stretched by predicted future demand.

Also real estate prices are considerably higher than in Europa both for private as commercial property.

Considering the availability of talent, the situation is comparable to Europe, the high demand for skilled IT-labor can only be partially met by the locally trained workforce. Therefore Australia attracts a lot of IT-staff from Asia or outsources parts of IT-development to Asian companies.

For Australian companies wanting to expand to Europe, the Netherlands is the country worth considering. Well positioned in the heart of Europe it has a perfect (digital) infrastructure, a business friendly environment and nearly all the Dutch speak English well. Especially now with the uncertainty in the market caused by Brexit the Netherlands is your gateway in the European single market.

Concluding this fact-finding mission has been very successful, giving participants a clear overview of the market opportunities and consequently a head start for their future expansion into the Australian market. Suggested follow up actions would involve a trade mission to Australia (Sydney and Melbourne) with a strong focus on finding partners and resellers. This might lead to a consortium of companies that will further establish their market presence by forming a PIB-consortium.





# MISSION TEAM

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## DETAILS PARTICIPANTS



**Stijn Grove, Managing Director** <https://www.linkedin.com/in/sgrove/>  
Dutch Datacenter Association <https://www.dutchdatacenters.nl/>  
Digital Gateway to Europe <http://www.digitalgateway.eu/>

Stijn is the director of both the DDA and Digital Gateway to Europe. He represents the data center industry and the broader tech & digital infrastructure sector during this trip.



**Ruud Alaerds, Director** <https://www.linkedin.com/in/ralaerds/>  
Dutch Hosting Provider Assoc. <https://www.dhpa.nl/>

Ruud is the director of the Dutch Hosting Provider Association, the industry organization for hosting providers.



**Wouter Koch** <https://www.linkedin.com/in/kochwouter/>  
Director APAC Usabilla <https://usabilla.com/>

Wouter is launching the Usabilla Sydney office this month. Usabilla collects User feedback on digital channels for Enterprise companies. Usabilla helps brands like HP, Philips, Booking.com, Lufthansa, KLM, Transavia and The Economist to improve the performance of their websites, apps and emails with live user feedback.



**Richard den Buitelaar** [www.linkedin.com/in/richarddenbuitelaar/](http://www.linkedin.com/in/richarddenbuitelaar/)  
Director/Owner, Qmakelaars <https://www.qmakelaars.nl/>

Richard is the founder and owner of QMakelaars, a real estate company that combines the best in social media and business process management to create an unique customer centric approach in the property market.



**Remko ten Barge** [www.linkedin.com/in/remkotenbarge/](http://www.linkedin.com/in/remkotenbarge/)  
Director, NieuweStroom <http://www.nieuwestroom.nl/>

Remko is the CEO of NieuweStroom, an energy supplier changing the Dutch energy market by offering dynamic pricing, enabling businesses to significantly reduce costs. The unique business model of NieuweStroom enables and encourages clients to adjust/shift/optimize energy consumption, taken into account the actual market prices. Besides cost savings, this will result in a more sustainable, efficient and transparent energy market to reduce peak consumption.

## MISSION TEAM

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**Edwin Oosterkamp**  
ibBooster

[www.linkedin.com/in/eoosterkamp/](http://www.linkedin.com/in/eoosterkamp/)  
<http://www.ibbooster.com/>

Edwin is the founder/owner of ibBooster. ibBooster supports international companies to expand to Europe. The company has a strong focus and wide experience in media, telecom and IT.



**Sebastian Hammers**  
Co-founder Human Insight

[www.linkedin.com/in/sebastianhamers/](http://www.linkedin.com/in/sebastianhamers/)  
<https://www.human-insight.com/>

Sebastian is the co-founder of Human Insight. Human Insights delivers business assessments for organisations to analyse their adaptability to change. The company's core activities are based on it's bespoke software for people analytics.



**Nasrath Popal**  
PM Internationalization, RVO

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<https://english.rvo.nl/topics/international>

Nasrath is program manager internationalization at the Netherlands Enterprise Agency (also known as RVO). RVO encourages entrepreneurs in sustainable, innovative and international business.



**Sandra Brandenburg**  
Partner Handelsroute.nl

[www.linkedin.com/in/sandrabrandenburg/](http://www.linkedin.com/in/sandrabrandenburg/)  
<http://handelsroute.nl/en/welcome>

Sandra is founder of handelsroute.nl. For the last decade handelsroute.nl has supported entrepreneurs in realizing their international growth ambitions. They do this by organizing inbound and outbound trade missions, matchmaking, events and export coaching.

## CONTACT DETAILS PARTICIPANTS

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## ABOUT US

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### ABOUT DIGITAL GATEWAY TO EUROPE

For over a 1000 years the Netherlands has been the (digital) gateway to the European market. Digital Gateway to Europe is the organisation promoting the Dutch Digital Data Hub, that helps you in many ways to prepare launch or expansion in the Netherlands.

We organize events such as trade missions, launchpads and other meet-ups to strengthen the Dutch digital hub. Scale-ups, start-ups and enterprises who would like more in-depth information regarding the Dutch digital economy can consult our Digital Gateway to Europe knowledge data base.

Find out more about the accessibility of large-scale Internet capacity, excellent business climate, privacy laws, net neutrality and many more reasons which make the Netherlands the preferred location for digital services and to distribute data.

### TRADE MISSIONS

Digital Gateway to Europe regularly organizes trade missions for the Tech industry and in close cooperation with the Dutch government. Over the last three years we visited United States (San Diego, San Francisco, Silicon Valley), Canada, Ireland, Spain, Germany, France, UK, New Zealand and Australia. Visit [www.digitalgateway.eu](http://www.digitalgateway.eu) for more information on upcoming missions. Stay up to date by visiting our site and subscribing to our newsletter.

#### *Let's work together!*

- *We are a source of information to prepare the launch or expansion of business in the Netherlands with facts, links and events.*
- *We publish up-to-date and relevant insights into the Dutch Data Hub, Dutch digital economy, infrastructure and ecosystem*
- *We organize multiple events with relevant content and work together with our extensive network full of relevant connections from the industry.*

## CONTACT US

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## PARTNERS DIGITAL GATEWAY TO EUROPE



## FURTHER READING AND RESOURCES

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### WEBSITES

- [www.digitalgateway.eu](http://www.digitalgateway.eu) Digital Gateway to Europe
- [www.dutchdatacenters.nl](http://www.dutchdatacenters.nl) Dutch Data Center Association
- [www.dhpa.nl](http://www.dhpa.nl) Dutch Hosting Provider Association
- [www.rvo.nl](http://www.rvo.nl) Rijksdienst voor Ondernemerschapp
- [www.investinholland.nl](http://www.investinholland.nl) Netherlands Foreign Investment Agency

### RECENT REPORTS (2017)



The Brexit “Should I stay or should I go” Report  
– Digital Gateway to Europe, October 2017



A European Data Hub Comparison  
- Dutch Data Center Association, August 2017

### OTHER 2017 REPORTS

- The State of the Dutch Data centers - Dutch Data Center Association, June 2017
- The Foundation of our Digital Economy - Dutch Data Center Association, Dutch Hosting Provider Association, ISPCconnect, TheMetisFiles, April 2017
- The value proposition of Dutch and European Data protection legislation - Dutch Data Center Association, February 2017
- The State of the Dutch Data Hub - Digital Gateway to Europe, November 2017 (expected)

All publications and can be downloaded freely on: <http://www.digitalgateway.eu>

# 10 + 1 REASONS WHY THE NETHERLANDS

## 1. Perfect connectivity

The Netherlands has Europe's lowest average latency, multiple submarine cable connections, an extensive fibre-infrastructure and competitive connectivity market.

## 2. EU Single Market

As part of the European Single (Digital) Market, the Netherlands is ideal for the distribution of data and digital services to other countries.

## 3. EU privacy legislation

As of May 2018, the Netherlands will implement the uniform General Data Protection Regulation.

## 4. Data driven economy

According to the 2016 report of Euro-IX, the Netherlands has one of Europe's highest traffic with an aggregated traffic peak of 5,187 Gbps.

## 5. International focus

The Netherlands is worldwide #1 on the English Proficiency Index (EF EPI) and tech firms as Uber, Tesla & Elastic are based in Amsterdam.

## + Low risk embargo

The Netherlands has a very low risk in restricting its commerce or exchange activities with others.

## 6. Long term policies

The Dutch have a pragmatic, long term orientation with the ability to adapt to changes.

## 7. Business compliant

A pro-business climate, competitive tax system, multilingual workforce and assistance and incentives for setting up businesses.

## 8. Stable politics

Since the Netherlands has a coalition government, policy swings are always quite moderate and have a certain predictability.

## 9. Favourable tax climate

Pro-active tax authorities supporting foreign investment, 5% effective tax rate for income from patents and software and favourable VAT system.

## 10. 30% ruling for foreign workers

Tax incentive ('30%-ruling') available for expats including R&D staff, no withholding taxes





**➤ Digital**  
**➤ Gateway to**  
**➤ Europe**



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Netherlands Enterprise Agency is part of the ministry of Economic Affairs and Climate Policy.