

WHITEPAPER

The Dutch IT Talent Crisis

A Strategic Guide for CIOs

18,700

ICT Vacatures

6,500

Software Dev

87%

Companies Affected

€65B

Global Market

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1. Executive Summary

The Dutch IT sector faces a structural talent crisis that shows no signs of abating. With 18,700 unfilled ICT vacancies (CBS 2024/2025) and an estimated 6,500 specifically in software development, organisations across all industries are experiencing stalled innovation, delayed projects, and constrained competitiveness.

This whitepaper examines the crisis through a strategic lens, providing CIOs and technology leaders with data-driven insights and actionable recommendations. Key findings include:

- Structural, not cyclical: Educational programs cannot produce sufficient graduates to close the skills deficit
- 87% of companies already face or expect talent shortages within the coming years (McKinsey)
- Market segmentation matters: Only the 'Free Market' (~3,000 companies) offers sustainable margins
- Nearshore is evolving: The global IT staffing and nearshore market is projected to reach \$120B by 2033
- Quality over price: Total Cost of Ownership (TCO) increasingly favors nearshore over offshore

"The talent shortage is not a temporary disruption—it is a fundamental restructuring of how technology organisations must operate and source expertise."

2. The Dutch IT Talent Crisis: Facts & Figures

The Dutch labour market is currently in a state of extreme tension, with the IT sector facing the most critical challenge. The demand for experienced technology experts has escalated significantly, fueled by accelerated digital transformation and relentless technological advancements across all organisations.

2.1 Current Vacancy Landscape

According to CBS (Centraal Bureau voor de Statistiek), the number of unfilled vacancies in the ICT sector rose from 18,100 to 18,700 in 2024/2025—an increase of approximately 3.3%. This figure represents all types of ICT-related vacancies, not solely software engineering positions.

2.2 Breakdown by Job Category

The following table shows the estimated distribution of ICT vacancies across different job categories:

Job Category	Est. %	Vacancies	Trend
Software Development/Engineering	~35%	~6,500	↑
Data / AI / Machine Learning	~10%	~1,900	↑↑
DevOps / SRE / Infrastructure	~8%	~1,500	↑
System/Network Management	~15%	~2,800	→
Security / Cybersecurity	~7%	~1,300	↑↑
Functional/Application Mgmt	~8%	~1,500	→
IT Support / Helpdesk	~12%	~2,200	↓
IT Management / Consulting	~5%	~930	→

Table 1: ICT vacancy distribution (Source: CBS, HCI estimation)

2.3 The Structural Nature of the Shortage

Critically, this IT talent shortage is projected to be a long-term structural issue. The gap between supply and demand is widening, as educational programs and universities simply cannot produce sufficient graduates to close the skills deficit. For businesses, this translates directly into:

- Stalled innovation and delayed digital transformation initiatives
- Increased project timelines and cost overruns
- Constrained ability to compete in rapidly evolving markets
- Higher salary costs and employee turnover
- Dependency on scarce freelance resources (ZZP'ers)

3. Market Segmentation Analysis

Understanding the Dutch IT market structure is essential for developing effective go-to-market strategies. The market can be segmented into three distinct categories, each with unique characteristics, procurement processes, and margin profiles.

3.1 Segment A: Government (Master Contracts)

Dutch central government, local governments, and semi-government institutions (healthcare, water boards) are required to work through European tenders, resulting in blanket contracts (framework agreements) for IT professionals.

Aspect	Characteristics
Mechanism	European tenders → Framework agreements
Winners	Large system integrators (Capgemini, Accenture, CGI)
Role for SMEs	Subcontractor to framework holders
Typical Margin	10-15% (framework holder claims 15-25%)
Recommendation	Avoid unless strategic partnership exists

3.2 Segment B: Large International Companies (RFP/VMS)

Large private companies (Philips, ASML, major banks) follow similar processes through Vendor Management Systems (VMS) and Preferred Supplier Lists. Rates and conditions are tight and non-negotiable, aimed at unifying hiring costs and minimising administrative burden.

3.3 Segment C: The 'Free Market' (Target)

The remaining approximately 3,000 companies (SME+, Mid-Corporate with 50-250 employees) do not have fixed framework agreements. This represents the target market for sustainable, high-margin engagements.

- Direct C-level access: CIO/CTO/CEO decision-making without procurement bureaucracy
- Value-based selling: Focus on strategic vision (Sovereignty, Risk Management), not CVs
- Higher margins: 30-40% achievable through quality positioning
- Relationship-driven: Network and proven track record are key differentiators
- Quality focus: TCO and risk mitigation trump absolute lowest price

4. The European Context

The Dutch IT talent crisis is not an isolated phenomenon. Across Europe, organisations face similar structural challenges, though the scale and specific characteristics vary by country.

4.1 Key European Findings

- Germany: 780,000 tech specialists shortage projected by 2026 (Stifterverband/McKinsey)
- France: 1.5 million talent gap expected by 2030 (Korn Ferry)
- Scandinavia: Sweden needs 70,000+ specialists; Norway faces 60,000+ shortage
- Eastern Europe: Emerging as key nearshore destination for Western European companies
- Serbia/Poland: Growing delivery centers with EU-compatible regulatory frameworks

4.2 Global Market Trends

The global IT staffing and nearshore services market demonstrates the scale of transformation underway. According to industry analysts, the market was valued at approximately USD 65 billion in 2024 and is projected to reach USD 120 billion by 2033, growing at a CAGR of approximately 7%.

5. Strategic Implications for CIOs

The convergence of talent scarcity, digital transformation demands, and regulatory requirements creates a complex strategic landscape for technology leaders.

5.1 The I&A Convergence

The traditional separation between Infrastructure (I) and Applications (A) departments has fundamentally changed. The advent of Agile/Scrum, DevOps, SaaS, and Cloud (IaaS/PaaS) has broken down these silos, creating new organisational structures and talent requirements.

Traditional Model	Current Reality	Implication
Waterfall development	Agile/Scrum sprints	Integrated Dev+Ops teams
On-premise infrastructure	Cloud (IaaS/PaaS/SaaS)	Infrastructure as Code
Separate I and A budgets	Unified IT budget	CIO/CTO accountability
Hardware management	Platform Engineering	Code-fluent infra teams
Project-based delivery	Product/Feature teams	End-to-end ownership

Table 2: IT organisational evolution and talent implications

5.2 The Quality Imperative

Quality in software engineering extends beyond functional requirements. For CIOs evaluating nearshore or external talent solutions, quality must be quantified across three key dimensions:

Dimension	Description	Key Indicators
Alignment	Meeting business needs	Requirements mastery, User adoption, Maintainability
Verifiable History	Proven track record	Reference clients, Project success rates, Retention
Ecosystem Mastery	Platform expertise	Certifications, Technology depth, Integration capability

6. Nearshore as a Structural Solution

Given the structural nature of the IT talent shortage, nearshoring has evolved from a cost-reduction tactic to a strategic capability.

6.1 Why Nearshore Over Offshore?

The question is not about absolute lowest price, but Total Cost of Ownership (TCO) and quality/risk management. Key differentiators include:

- Time Zone Alignment: Same or +/- 1-2 hours enables real-time collaboration
- Cultural Fit: European work ethics, communication styles, professional values
- Language Proficiency: Strong English skills; often Dutch/German capabilities
- Regulatory Compliance: GDPR, AVG, SCCs alignment; EU candidate/member status
- Travel Accessibility: 2-3 hour flights for face-to-face meetings when needed
- Quality Talent Pool: Strong technical universities; proven software engineering culture

6.2 Key Nearshore Destinations

Destination	Strengths	Considerations
Serbia	Microsoft partner ecosystem, EU candidate, cost-effective	Visa requirements (non-EU)
Poland	Large talent pool, EU member, mature market	Increasing rates
Portugal	Strong English, time zone, EU member	Growing popularity = competition
Romania	Technical depth, cost-effective, EU member	Retention challenges
Ukraine	Excellent engineers, competitive rates	Geopolitical risk

6.3 The Deloitte Finding

"87% of tech businesses opt for nearshoring or offshoring to combat skill gaps and reduce labour costs."
— Deloitte Survey

7. Recommendations & Next Steps

Based on the analysis presented in this whitepaper, we offer the following recommendations for CIOs and technology leaders navigating the Dutch IT talent crisis:

7.1 Strategic Recommendations

- Accept the structural reality: The talent shortage will not resolve through traditional hiring. Build a diversified talent strategy that includes nearshore partnerships.
- Focus on the 'Free Market': Avoid low-margin government and VMS-driven engagements unless strategically essential. Target mid-market companies for sustainable partnerships.
- Prioritise quality over price: Evaluate partners on TCO, quality dimensions, and cultural fit—not hourly rates alone.
- Align with the I&A convergence: Seek partners who understand Platform Engineering, DevOps, and integrated delivery models.
- Build C-level relationships: Move beyond technical procurement to strategic discussions about governance, sovereignty, and risk.

7.2 Evaluation Framework

Criterion	Questions to Ask	Weight
Quality Track Record	Client references? Project success rates? Retention?	High
Technical Depth	Certifications? Platform expertise? Innovation capability?	High
Cultural Alignment	Communication style? Work ethics? Language proficiency?	Medium-High
Compliance & Security	GDPR readiness? Security practices? Audit capability?	High
Scalability	Team growth capacity? Knowledge transfer processes?	Medium
Commercial Model	Pricing transparency? Flexibility? Risk sharing?	Medium

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About HES Consultancy International

HES Consultancy International provides technology solutions, healthcare innovation, and data-driven growth services across Europe. Founded in 2021 and headquartered in Arnhem, The Netherlands, the company specialises in AI-powered solutions, strategic partnerships, and go-to-market consulting for the Benelux and DACH regions.

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