



Clingendael

Nederlands Instituut voor Internationale Betrekkingen

NOVEMBER 2025

How Dutch companies deal with economic security

Winning the world between awareness and action

This Policy Brief presents the findings of a survey on economic security among Dutch companies active in critical and emerging technologies or in providing vital processes or services. These include companies—both large and small—operating in sectors such as semiconductors, AI and quantum technology, cleantech, IT and digital infrastructure, as well as water and food industries.

Of the 90 companies that participated in the survey, nearly half were still largely unfamiliar with the concept of *economic security*—a topic currently high on the agenda of policymakers in The Hague. Economic security encompasses a wide range of factors that can make companies—and the Dutch economy as a whole—vulnerable: from financial, IT and data risks to geopolitical dynamics that affect supply chains and personnel policy.

Although nine out of ten companies acknowledge the risks related to economic security, not all companies have invested in measures to address them. In particular, there is a relatively large gap between perceived risk and action when it comes to supply chains and investment, merger and acquisition activities. Moreover, Dutch government instruments designed to support economic security (such as the Entrepreneurs' Desk for Economic Security and the Investment Screening Bureau) are only known to one-third of respondents.

To strengthen the resilience and competitiveness of Dutch companies—and thereby the economy and society as a whole—the government would do well to invest in greater awareness of economic security and the tools available to address it. This awareness should not only highlight concerns or risk perceptions but also perceived opportunities, which should serve as motivation for more economic-security measures. Collaboration with sectoral organisations can help meet the need for support and stimulate strategic dialogue in the most sensitive industries. After years of protective government measures, such as stricter investment screening and export controls, companies are now seeking broader knowledge and support in addressing economic-security risks.

From economic efficiency to (adding) economic security

After three decades of globalisation, the Netherlands and the European Union have in recent years undergone a paradigm shift—from a focus on economic efficiency to greater attention to economic security. This shift applies first and foremost to government, but also increasingly to businesses. Borders are once again becoming a defining factor in international trade. The complex global supply chains that companies built under the ‘just-in-time’ principle of economic efficiency—with minimal inventories and storage—are now being diversified or relocated.

These fundamental changes are primarily driven by four geopolitical developments: the hardening relationship between the United States (US) and China; the Covid-19 pandemic; Russia’s invasion of Ukraine and wars in the Middle East¹; and, most recently, the disruptive trade and technology policies of President Donald Trump in the US.

As political interference in the economy intensifies, and economic power is increasingly used for political purposes, so too grows the focus of governments on economic security. A key element of this is a reassessment of the relationship between government and business, driven by the desire for greater strategic coordination. The goal: to strengthen Dutch competitiveness, mitigate risks and enhance resilience. Failing that, companies and society as a whole will become ever more subject to the whims of foreign powers.

What is economic security?

Traditionally, corporate risk management focused on insurance and financial risks, but over the past two decades this focus has

broadened in response to systemic changes and the expectations of investors, customers and citizens. Accordingly, companies have invested in mitigating so-called ESG risks—those relating to Environmental, Social and Governance domains.²

More recently, attention has been turned to geopolitical and geo-economic developments as sources of corporate risk. Aspects of business operations not previously regarded as particularly risky are now increasingly perceived as potential vulnerabilities. In addition to information and data security and the protection of intellectual property, other aspects to come into focus include: supply chains; investments, mergers and acquisitions by non-European parties; procurement and tendering processes; as well as personnel policy and the physical safety of employees.

Government and business leaders face the challenge

Government and business leaders face the challenge of minimising the impact of adverse global and geopolitical events and securing supply chains. Yet the playing field is not level: European countries and companies—having pursued open trade and globalisation more consistently and for longer than those in any other region—are more exposed to dependencies and vulnerabilities.³

European economies were hit hard by the (self-imposed) halt on gas deliveries from Russia’s Gazprom. President Trump’s tariff wars and export controls have also affected Dutch companies. In addition, the potential expansion of Chinese export bans on critical minerals—essential for many products—and possible disruptions to cloud and software services provided by US tech firms are becoming increasingly likely.

1 Maaïke Okano-Heijmans, Floor Stoelinga et al., [Verkenning Toolkit Economische Veiligheid](#), Clingendael Report, March 2025, p. 92 (in Dutch). For an English summary of this study, see [Exploring Economic Security Toolkits](#), Clingendael Policy Brief, March 2025.

2 Mikael Wigell et al., [Navigating Geoeconomic Risks: Towards an International Business Risk and Resilience Monitor](#), Finnish Institute of International Affairs (FIIA), November 2022, p. 27.

3 See, for example, Eurasia Group, [Top Risks 2025: Implications for Europe](#), 6 January 2025.

Now what?

The Dutch government is focusing on strengthening open strategic autonomy and economic security.⁴ The Dutch public is also concerned about undesirable dependencies.⁵ Rising energy prices and inflation have led to serious worries about livelihoods and the survival of energy-intensive industries in Europe. At the same time, there is optimism about stronger protection against cyberattacks on vital infrastructure, the revival of advanced manufacturing in the Netherlands and the reduction of strategic dependencies.⁶ There is public support for investment in economic security.

To design effective policies, policymakers are seeking a baseline for assessing companies' resilience to economic-security risks. Using this baseline as a starting point, they can more effectively encourage companies to take targeted measures to protect themselves. At the same time, the role of national and local governments is being re-evaluated: how can they help businesses become more resilient to geopolitical risks—and seize the opportunities that arise with it?

Business survey on economic security

Against the backdrop of a national reorientation regarding the relationship between government and business, the Clingendael Institute conducted a *Business Survey on Economic Security* between May and July 2025 at the request of the Dutch Ministry of Economic Affairs. The survey targeted Dutch companies active in critical and emerging technologies, as well as those providing vital processes or services. This Policy Brief presents the most striking results of the survey, supplemented by reflections and concluding with suggestions for next steps.⁷

The questionnaire for Dutch companies was inspired by a survey of 100 Japanese firms, published for the fourth time in 2025 by the Japan Institute of Geoeconomics.⁸ Japan has for many years been a global frontrunner in the field of economic security, even adopting a law on the subject in 2022.⁹ A comparison between the Dutch and Japanese surveys offers valuable insights into how companies think and act. As such, the comparison also supports the strategic dialogue between Dutch policymakers and business representatives on the long-term competitiveness and resilience of the Netherlands as an EU member state.

4 See Letter to Parliament, [Open Strategische Autonomie](#), 8 November 2022 (in Dutch); and Government of the Netherlands, [Agenda Digitale Open Strategische Autonomie](#), Report, 17 October 2023 (in Dutch). The Dutch Ministry of Economic Affairs defines economic security as the resilience of the economy and the business community to risks arising from international economic activities and geopolitical developments. An adverse side effect of investments in 'economic security' by the Netherlands and Europe is that many developing economies perceive such policies by major powers—primarily the US and China, but also the EU and Japan—as protectionist.

5 See recent [AIJD Annual Reports](#) and Clingendael's [Barometer](#), 'Between Hope and Fear' (in Dutch).

6 Monika Sie Dhian Ho, Mark Elchardus, Christopher Houtkamp and Teun van der Laan, [Tussen hoop en vrees: Van Ruslandshok naar Hamasschok—De verzuchting naar eigentijdse gemeenschapsafbakening](#), Clingendael Alert, February 2024 (in Dutch).

7 In addition to this survey-based quantitative measurement, investments are also being made in qualitative research and knowledge of the impact of geopolitics on businesses. See, for example, Rem Korteweg, Maaike Okano-Heijmans and Diederick van Wijk, [Government and Businesses: Work Together in the Triple Transition of Geopolitics, Sustainability and Digitalisation](#), Clingendael Policy Brief, February 2024.

8 In September 2025, the Institute of Geoeconomics (IOG/API) in Tokyo published the [Survey Results of 100 Japanese Companies on Economic Security](#) for the fourth consecutive year.

9 Okano-Heijmans et al., [Verkenning Toolkit Economische Veiligheid](#); and its English summary, [Exploring Economic Security Toolkits](#).

The sample population for this survey consists of knowledge-intensive Dutch companies, of which 67 completed the survey in full.¹⁰ The lack of a comprehensive overview of Dutch knowledge-intensive firms makes it difficult to determine whether strict conditions for representativeness have been met. However, when viewed alongside other business surveys, the responses are sufficient to draw meaningful conclusions about how knowledge-intensive companies in the Netherlands think and act regarding economic security.¹¹ This analysis serves as a baseline for possible follow-up surveys in the Netherlands and across Europe.¹² Our ambition is to repeat the survey in the coming years and further map knowledge-intensive enterprises to better understand the Dutch economic-security landscape. The survey also serves as a foundation for strategic discussion among government, knowledge institutions and the business community, as well as among companies themselves.

For this survey, Clingendael collaborated with organisations from the private sector—particularly the business associations VNO-NCW and FME, as well as Techleap and Quantum Delta NL—and with the Ministry of Economic Affairs as the commissioning authority.

In focus: knowledge-intensive companies

The target group of the *Business Survey on Economic Security* largely consists of knowledge-intensive companies that are active in critical and emerging technologies (including IT products, semiconductors, quantum and AI), as well as companies that provide vital processes or services such as water or food (see Figure 1).¹³ These companies are of strategic importance to the economic security of the Netherlands: they enable a strong, innovative and competitive economy that is more resilient to threats to national security.¹⁴ They are also essential to addressing major societal challenges.

At the same time, it is precisely the activities of these companies that attract the attention of other states and state-affiliated actors. This creates not only geo-economic risks for the companies themselves,¹⁵ but also risks to national public interests—for instance, through disruptions to supply chains and the continuity of critical services.

Figure 2 shows the size distribution of the companies that responded to the survey. The majority are large enterprises (42 per cent). Small enterprises make up the smallest group at 15 per cent, while micro- and medium-sized companies account for 21 and 22 per cent, respectively.

By sector, the highest share of companies falls into the category 'Other'; this group partly includes (legally designated) vital providers of services such as drinking water and food companies.¹⁶ After this category, the digital sectors—including IT, cybersecurity, digital

10 Between 16 May and 8 July 2025, 90 Dutch companies started the survey, of which 67 completed it in full. All responses, including incomplete ones, were included in the data analysis, because a smaller sample size leads to less representative results and partial results also contain valuable information. The survey was mainly completed by respondents in management positions, but also by employees with a role in safety and risk management and middle management.

11 See, for example, FME, [FME verkiezingsinbreng: Terug naar de kopgroep](#), 28 July 2025; Techleap and Deloitte, [AI Scaling Challenges for Dutch Founders Report](#), 17 October 2024; and Justus van Kesteren et al., [Skills gap in de technologische sector](#), Rapport SEO Economisch Onderzoek, 10 August 2022.

12 In late 2025, the Clingendael Institute, together with European partner institutes and in collaboration with Business Europe, will conduct a business survey on economic security among European companies, including those in the Netherlands.

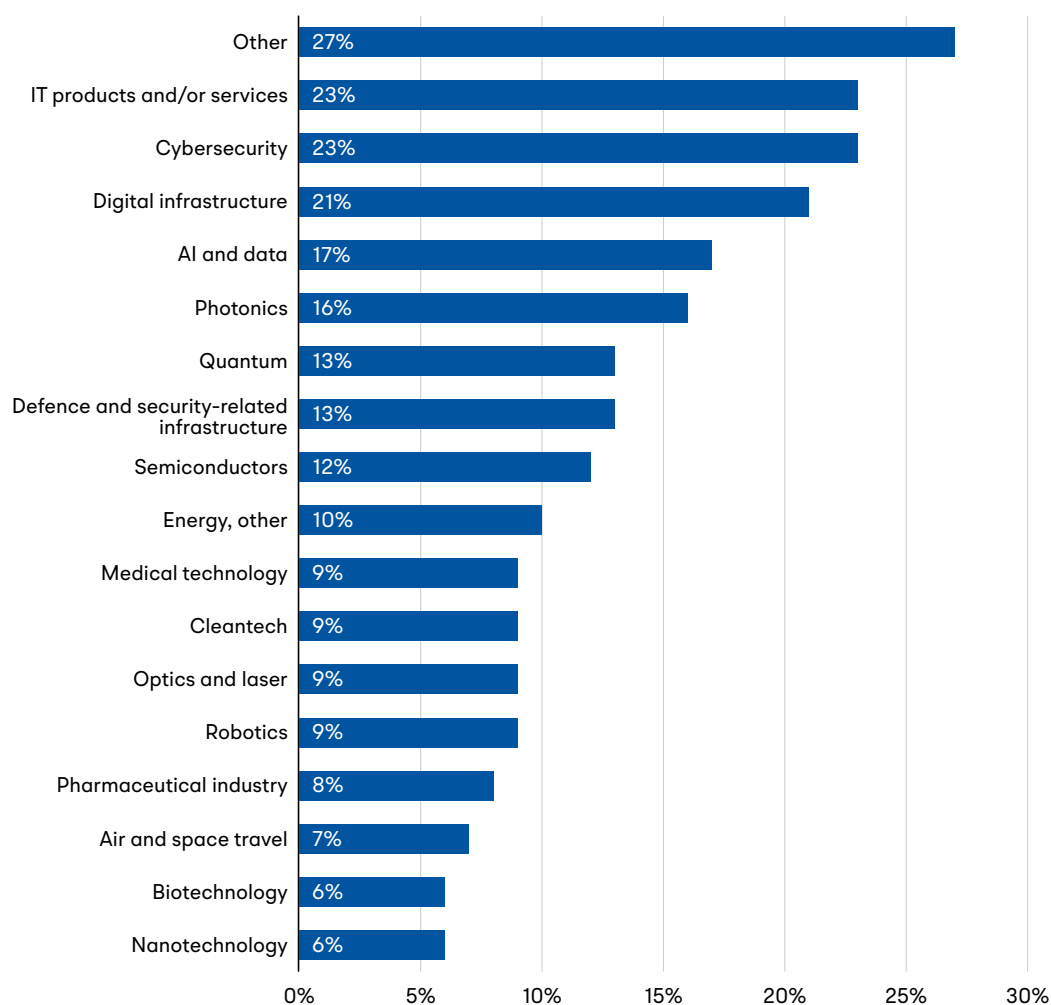
13 Rijksoverheid, [Voorrang tien cruciale technologieën voor economie, maatschappij en veiligheid](#), Nieuwsbericht, 19 January 2024; and NCTV, [Overzicht vitale processen](#).

14 See Rijksoverheid, [Kamerbrief over voortgang kabinetsaanpak economische veiligheid](#), 1 July 2025, p. 4.

15 Tomi Kristeri et al., [Preparedness for Geoeconomic Risks](#), Helsinki: FIIA, July 2025.

16 These vital providers accounted for seven of the 24 companies in the 'other' category.

Figure 1 In which sector(s) or technology area(s) is your company active? (N = 90)

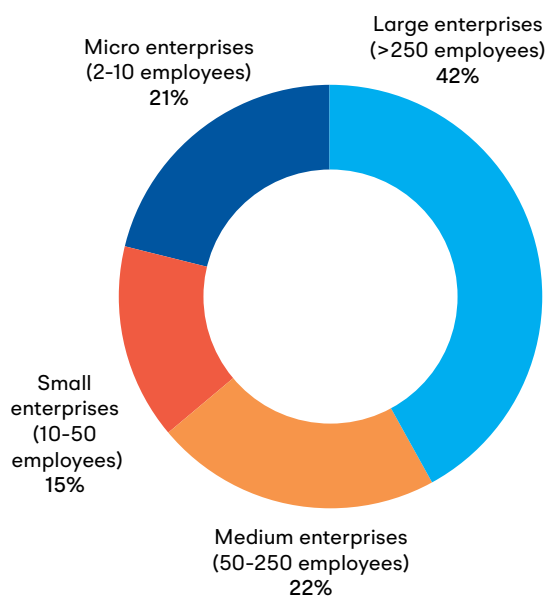


infrastructure and AI and data—are the most represented. The photonics and semiconductor industries are also well represented among respondents. This is hardly surprising, as these sectors have found themselves at the centre of the economic-security debate for several years because of export controls, and are therefore more familiar and actively engaged with the topic than the average sector.

The emerging quantum industry is likewise relatively well represented in the survey.¹⁷ This high response rate may be attributed to the collaboration with Quantum Delta NL in this project, but can perhaps also be seen as a positive outcome of the investment that the Dutch government—through the National Growth Fund—has made in the sector in recent years.

¹⁷ Of the approximately 30 companies in Quantum Delta NL's support base, seven companies responded to the survey.

Figure 2 Which size category does your company fall into? (N = 89)



Three-quarters of companies are active abroad, across various regions and in different ways. Overseas activities range from production (42 per cent), sales and services (32 per cent), R&D (26 per cent) and logistics and distribution facilities (24 per cent). Over 70 per cent of companies are active in Europe, followed by 36 per cent in the US, 35 per cent in Asia—excluding China—and 31 per cent in China. North America—excluding the US—follows with 25 per cent; thereafter the Middle East, South America and Oceania account for roughly 21 per cent each. Slightly more than half of companies (54 per cent) report having no plans for (further) international expansion.

Economic security and risk management: on the radar, but...

Just over half the companies (54 per cent) are familiar with the concept of economic security. This is a sizeable share, but stands in stark contrast to Japan, where 99 per cent of companies know the term. This difference may stem from the fact that Japan has economic-security legislation (see the section below on ‘Government and business: work together’). Large Dutch companies are especially familiar

with the concept; 70 per cent, compared with 44 per cent of micro-enterprises. It is not fully clear whether these companies interpret economic security in the same way—and whether that interpretation aligns with the Dutch Ministry of Economic Affairs’ definition. This matters, as firms may know only a specific instrument or sub-area of economic security (such as investment screening or export controls) and therefore may not engage with the broader picture—or the overarching objective.

After reading the definition of economic security used by the Ministry of Economic Affairs (presented in the survey),¹⁸ a very large majority of companies (87 per cent) indicated that they see risks or challenges in this area. This striking contrast between familiarity with the concept of economic security and perceived risks for the company in this domain is shown in Figures 3 and 4.

As shown in Figure 5, 43 per cent of Dutch companies in the sample discuss geopolitical developments at least once a month during board meetings. Meanwhile, 16 per cent indicate that geopolitics is never on the board agenda or only once a year. Attention to geopolitical developments among Dutch companies therefore appears markedly lower than in Japan, as the Japanese survey found that 89 per cent of respondents *always, often or sometimes* discuss how to deal with geopolitical developments in board meetings.

¹⁸ After the open question asking respondents whether they are familiar with economic security, the survey provided the definition of economic security used by the Dutch Ministry of Economic Affairs, as mentioned in footnote 4.

Figure 3 To what extent are you familiar with the term ‘economic security’? (N = 80)

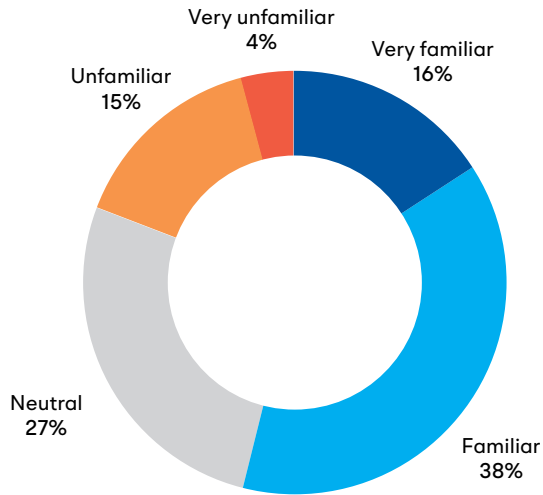


Figure 4 Do you see risks or challenges in the field of economic security that could affect your company now or in the future? (N = 72)

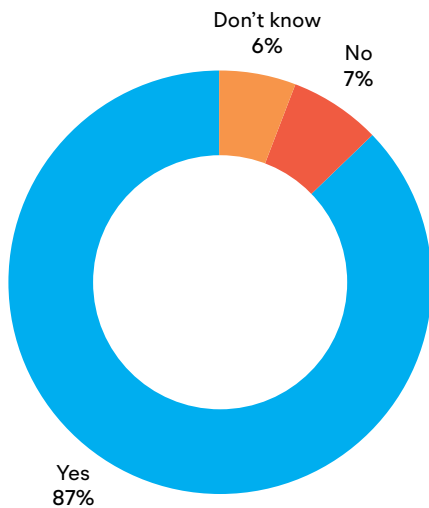
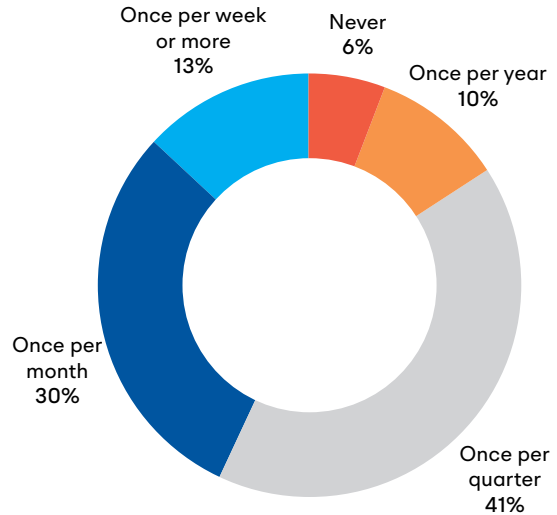


Figure 5 How often do you discuss the impact of geopolitical developments on your business operations in board meetings? (N = 70)



Two-thirds of companies (67 per cent) have taken additional measures in response to geopolitical developments over the past five years. Frequently cited developments include Russia’s invasion of Ukraine, the US trade war and the behaviour of President Trump and Chinese influence and dependencies. The Covid-19 pandemic also served as an important catalyst. In light of geopolitical turbulence, companies have chosen to focus more on the European market or to diversify their supply chains so they are not solely dependent on one single supplier or country. Notably, many companies are currently reconsidering their dependence on US tech firms for their IT infrastructure (cloud storage and software).¹⁹

¹⁹ In response to the open question about which geopolitical developments have prompted companies to take additional measures against economic-security risks in the past five years, the most common response was ‘research into/investment in European alternatives to American cloud services’. This was followed by (influences from) the US, Russia and China in a general sense, often without further specification.

What are companies (not) doing?

In response to rising uncertainties, many governments—including the Netherlands—have actively pursued economic-security policies in recent years. For the same reason, a growing number of companies have begun investing in some form of (geopolitical) risk management.²⁰ Our survey suggests that knowledge of the term ‘economic security’ was not a precondition for this type of investment. The research shows that these corporate responses ranged from concrete operational measures to investments in knowledge about geopolitical developments and potential risks, legal requirements or future scenarios.

However, the fact that nearly nine out of ten companies report that they perceive economic-security risks (Figure 4) does not mean that they act on them immediately. As Figure 6 illustrates, there is a gap between the percentage of companies that perceive a specific economic-security risk and the percentage that have actually taken measures. This holds for several aspects regarded as major risks, such as information and data security (74 per cent perceive risks, while 67 per cent have already taken measures); protection of intellectual property (53 per cent versus 46 per cent); and procurement and tendering (28 per cent versus 24 per cent).

Two areas show a particularly large difference between perceived risk and action: supply chains; and investment, mergers and acquisitions. For supply chains, 61 per cent of companies report perceiving risks, but only 38 per cent have taken measures. Regarding investment, mergers and acquisitions, 32 per cent perceive risks, yet only 19 per cent have acted. This gap may be explained by the

fact that these are relatively new themes that run counter to deeply rooted beliefs in an open, market-driven economy. The costs of measures and/or the difficulty of implementation may also play a role; for example, because of a knowledge gap within companies (about their own supply chains) or a lack of alternatives (for acquisitions).

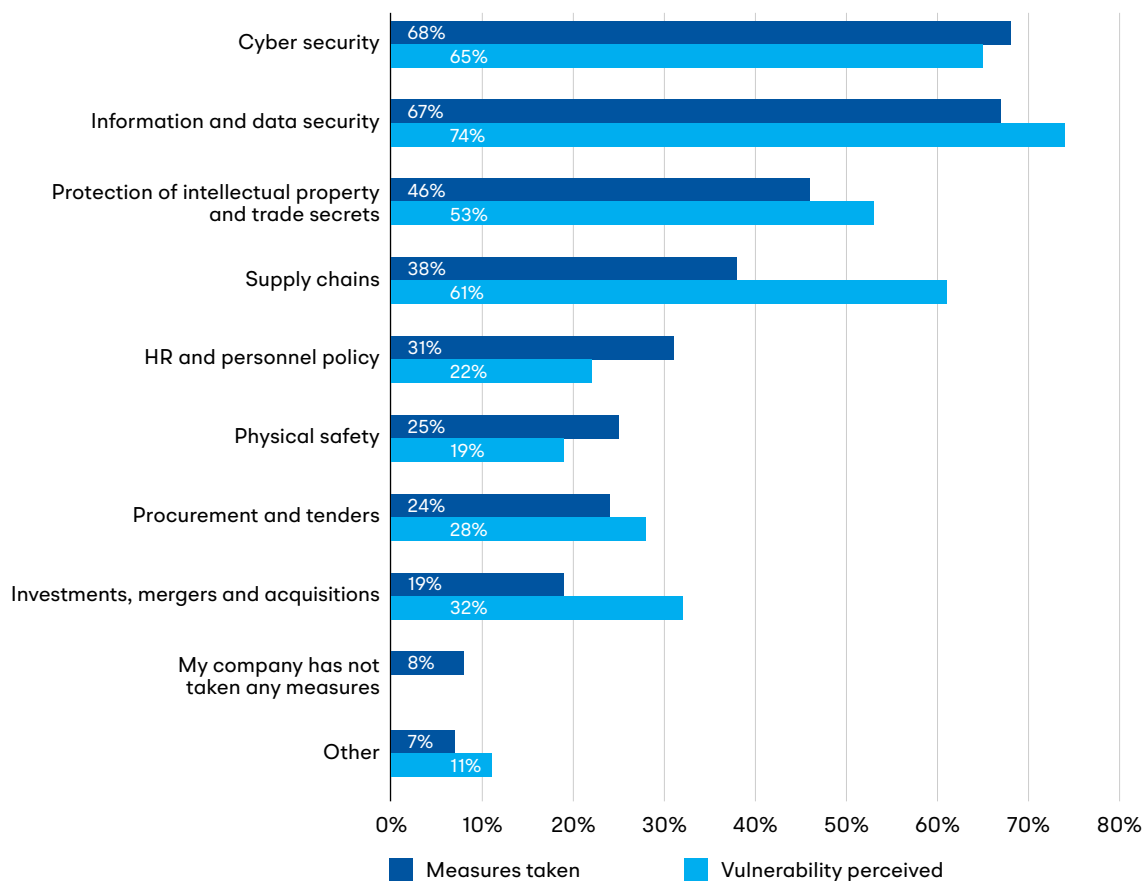
In three other operational areas, the share of companies perceiving a risk is actually smaller than the share that has taken measures. This category includes cybersecurity (65 per cent versus 68 per cent), HR and personnel policy (22 per cent versus 31 per cent) and physical security (19 per cent versus 25 per cent). It appears that companies have had these risks on their radar for longer and have been able to act on them more readily (especially for cybersecurity). A limited group—8 per cent of companies—has not taken any measures at all.

Given the difference between perceived risks and measures taken, it is no surprise that two-thirds of companies want to take (more) economic-security measures. This intention is most pronounced among small and medium-sized enterprises (78 and 79 per cent, respectively). The share is somewhat lower for large companies (72 per cent) and much lower for micro-enterprises (51 per cent). One-quarter are unsure whether further economic-security measures are being considered, and only 10 per cent are not working on them at all.

There is a clear preference among companies to focus future measures on supply chains: 55 per cent indicate that they are considering action in this area. Most companies also wish to take measures on cyber- and information and data security (both 43 per cent). For other economic-security measures, fewer than 35 per cent of companies are considering action.

20 Discussions between the authors and companies and industry organisations in recent years. See also: Remko Blom et al., [Impact van Geopolitiek: Hoe bedrijven hun strategie bepalen](#), Mediawerf, April 2025 (in Dutch, English translation forthcoming).

Figure 6 Which aspects of your business operations do you consider vulnerable to potential economic-security risks, and for which aspects have you already taken measures against potential economic-security risks? (N = 72)



Why take economic-security measures?

The reasons for taking measures against economic-security risks vary, but generally cover two areas: corporate interests, namely continuity and risk avoidance; and national security.

Specifically, most companies say they take measures against economic-security risks to safeguard business continuity (66 per cent). Many also act because of undesirable dependencies (59 per cent) or potential financial damage (53 per cent). A minority (43 per cent) indicate that they also take measures to contribute to national security and to comply with legal requirements. These are measures

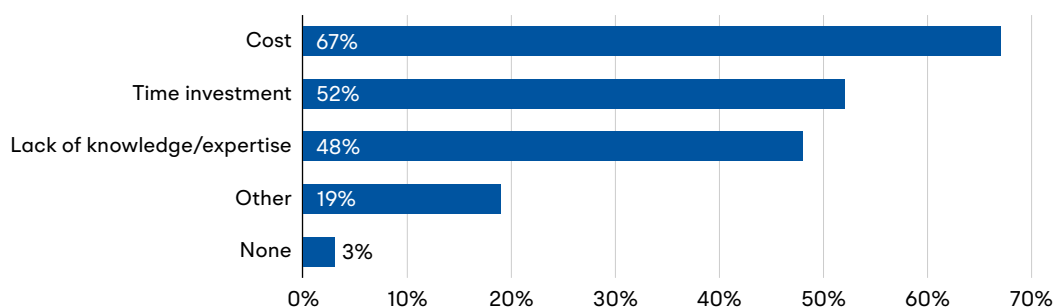
encouraged by the Dutch government and industry associations.

It is important to understand better when and how companies take measures against geopolitical risks, as this can help improve strategic alignment between government and business.

The results show that geopolitical threats motivate companies to act. Ideally, not just concerns or risk perceptions but also perceived opportunities would prompt the adoption of more economic-security measures.²¹ Such economic security-related positive economic prospects—such as gaining a lead over

²¹ For more on this, see Blom et al., [Impact van Geopolitiek](#).

Figure 7 In your view, what are the main barriers to taking measures against economic-security risks in your business operations? (N = 69)



competitors and instilling confidence among investors—are currently cited by relatively few companies as reasons for action (30 and 23 per cent, respectively). A dialogue between government and business on the potential positive economic effects of economic-security measures could act as a catalyst for jointly exploring these opportunities.

Against this backdrop, it is useful to reflect on differences in concepts and vision between government and business. Ideally, this difference—and how to bridge it—would form part of a strategic long-term conversation between the two. The fact that companies still often classify economic-security measures under the heading of ‘risk management’ points to a higher degree of continuity with the traditional focus.²² This contrasts with European governments, including the Netherlands, which are experiencing a paradigm shift towards economic security.²³ The Dutch government thus recognises a clear break with the dominant market-driven approach that emphasises efficiency, removing barriers and creating conditions for effective market functioning and openness, and a more geostrategic mindset

that adheres less strictly to neoliberal economic practice.²⁴ For companies, it is harder to speak of a clear break. There are, however, signs of change, as evidenced by the fact that national security is also cited in the survey as a consideration for economic-security measures,²⁵ and by the appointment of staff responsible for ‘government relations’, alongside the traditional risk-management department.

As illustrated in Figure 7, many companies cite additional costs as the greatest barrier to taking economic-security measures (67 per cent). Time investment (52 per cent) and lack of knowledge and expertise (48 per cent) are also named as obstacles. This may indicate that companies struggle to weigh the short-term costs of economic-security measures against the long-term costs of inaction. The costs to be incurred from acting now inevitably weigh on the annual accounts, while any later costs of not acting remain (largely) invisible. Given the government’s and industry associations’ desire to encourage companies to take more economic-security measures, there is an opportunity here to stimulate discussion and nudge firms to invest now for the long term.

22 Wigell et al., [Navigating Geoeconomic Risks](#); and discussions between the authors and companies in the context of this and related projects.

23 Focco Vijselaar (then Director-General for Business and Innovation, Dutch Ministry of Economic Affairs and Climate Policy), in [New industrial policy narratives | State of the Union Conference](#), Clingendael, 29 September 2021.

24 Maaïke Okano-Heijmans, ‘[EU Economic Diplomacy: A Decade of Reckoning](#)’, chapter in: Stephen Woolcock (ed.), *The New Economic Diplomacy*, London: Routledge, 5th edition 2025, p. 125.

25 Interviews conducted by author Maaïke Okano-Heijmans as part of the book project ‘[Impact van Geopolitiek](#)’ (see footnote 20) revealed a similar picture of steady change within companies.

Government and business: work together

Companies considering economic-security measures naturally look for information and advice. Half of the companies prefer to receive information on economic security through meetings organised by industry associations. Other frequently mentioned channels are central government websites, online presentations, newsletters and round-table discussions. When it comes to targeted, personalised guidance and advice, companies' expectations of government are strikingly modest.

For advice on economic security, companies consider the Dutch government by far the most reliable source (76 per cent). Industry associations and intelligence services also emerge as important sources of information (50 and 49 per cent), followed by the EU, knowledge institutions and other entrepreneurs in the same sector.

The preferred supportive role for the government is in signalling and risk clarification (88 per cent). As Figure 8 shows, most companies also expect practical advice and tools (68 per cent) and access to government networks (46 per cent).

Companies that have other forms of support in mind (17 per cent) mention policy changes such as clear regulations, stronger coordination and industrial policy, research subsidies and measures that remove risks by, for example, helping to make European cloud services available or offering collective security services already used by the government. These companies would like to see the Dutch government not only provide support, but also take more concrete action itself to strengthen corporate resilience.

When asked about when and why companies actively seek information on economic security, the vast majority (75 per cent) answer that changes to laws and regulations serve as the trigger. The Japanese experience suggests that economic-security legislation does indeed raise awareness of the subject:

in Japan—the only country in the world with such legislation—99 per cent of companies report that they know the term 'economic security'.²⁶ However, given the regulatory burden many Dutch companies already experience, it is advisable to encourage firms to invest in resilience against economic-security risks by other means. At the same time, companies themselves may benefit from acting more proactively to address economic security. By investing in their own economic security and engaging in regular, strategic discussions with government, companies can influence regulatory measures and perhaps even prevent them.

This public–private interplay would undoubtedly bring the government's economic-security policy instruments more squarely into corporate view. One-third of companies indicate that they are unfamiliar with any of the instruments or government bodies that can provide support on economic security. There is therefore much to be gained from information-sharing and knowledge exchange between government and business.

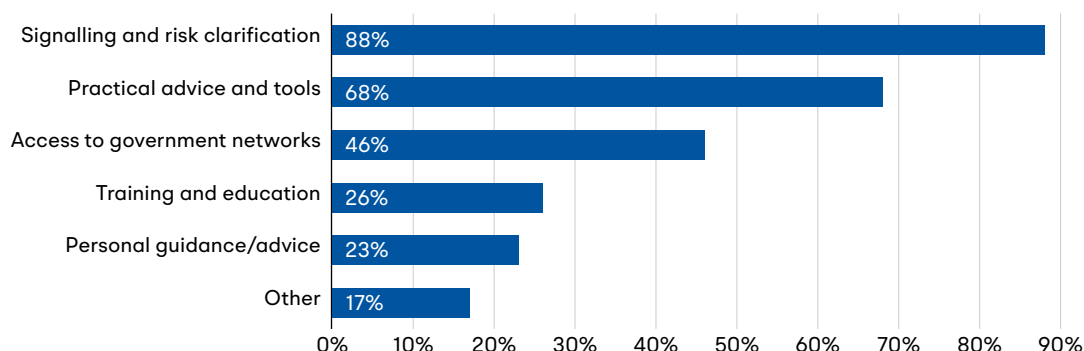
One challenge for such cooperation is that the objectives of economic security are not the same for government and business: government acts in the public interest and seeks a balance between economic and national security, while companies act primarily to safeguard profit and avert business risks. The challenge for government is thus to encourage companies to assume greater geopolitical responsibility. This requires listening and responding to companies' needs and concerns.

Next steps

The first *Business Survey on Economic Security*, conducted among Dutch companies in the first half of 2025, offers valuable insights into the current situation, challenges, concerns and priorities regarding economic-security (change) management. It shows that only a narrow majority of surveyed companies are familiar with

26 VNO-NCW, [Ingrid Thijssen: 'Stille exodus investeringen is sluipmoordenaar voor onze welvaart'](#), 15 September 2025.

Figure 8 What do you expect from government in terms of support for taking measures against economic-security risks? (N = 69)



the term ‘economic security’. Fewer than half the companies discuss the impact of geopolitical developments on business operations more than once per quarter in board meetings, despite the fact that nearly nine out of ten companies see challenges in economic security.

The survey also sheds light on companies’ preferences for advice, information and dialogue—needs that are shared by both business and government. To enhance the resilience and competitiveness of Dutch companies, the Ministry of Economic Affairs would do well to initiate—and continue—investment in knowledge of economic security and associated instruments without delay.²⁷

The survey findings point to the following courses of action for government and business:

- **Invest in greater awareness of economic-security instruments among companies.** None of the instruments or government bodies mentioned in the survey that can offer economic-security support are currently known to more than one-third of companies.
- **Prioritise more robust supply chains, and conscientious investment, merger and acquisition activities, in dialogue with companies.** These are the two areas where

firms perceive significant risk but act the least.

- **Changes in laws and regulations are the most powerful instruments to raise attention for economic security among companies.** Despite companies’ frequent complaints about regulatory pressure, such measures could be explored in consultation with business.
- **Support companies in taking economic-security measures.** Most firms cite additional costs and time investment as the biggest barriers. International comparative research indicates that **policy incentives—such as tax advantages**—can spur companies to take further economic-security measures.²⁸
- **Work with industry associations** to foster dialogue on economic security.²⁹ Government and business alike seek alignment on long-term strategy, interests and priorities. Discuss the survey results with companies to give nuance to the findings, clarify support needs, increase awareness of government economic-security instruments and to ensure that the conversation about economic security is regular and sustained.
- **Invest in close contact with sectors and sectoral ecosystems.** The high response from quantum companies suggests that such

27 In this regard, the Ministry collaborates with other relevant ministries, industry organisations and implementing bodies such as the Netherlands Enterprise Agency (RVO), Invest-NL and Invest International.

28 See also: Okano-Heijmans et al., [Verkenning Toolkit Economische Veiligheid](#), p. 92; and its English summary, [Exploring Economic Security Toolkits](#).

29 All four industry organisations that participated in this survey expressed a desire to do so.

engagement helps to raise awareness of economic security.³⁰

- **Meet companies' knowledge needs regarding economic security.** To support economic security action, firms primarily expect signalling and risk clarification from government, as well as practical advice and assistance.
- **Promote economic security awareness and internal discussion within companies by repeating this benchmark survey annually,** in line with the wishes of the industry associations that partnered in this survey.
- **Invest in a broader 'promote agenda'.** Measures that help maintain or enhance domestic capabilities and competitiveness are seen as a desirable complement to supporting companies on the 'protect agenda' of defensive measures. Companies would also like the government to take more concrete action itself to strengthen corporate resilience—for example, by stimulating European cloud services and storage.

³⁰ Thanks to funding from the National Growth Fund, Quantum Delta UK invests not only in technological research and innovation, but also in strategic knowledge and geopolitical awareness among companies in the sector.

About the Clingendael Institute

Clingendael – the Netherlands Institute of International Relations – is a leading think tank and academy on international affairs. Through our analyses, training and public debate we aim to inspire and equip governments, businesses, and civil society in order to contribute to a secure, sustainable and just world.

www.clingendael.org
info@clingendael.org
+31 70 324 53 84

✉ @clingendaelorg
f The Clingendael Institute
in The Clingendael Institute
@ clingendael_institute
▶ Clingendael Institute
📄 Newsletter

About the authors

Maaike Okano-Heijmans is a Senior Research Fellow at the Netherlands Institute for International Relations 'Clingendael' in The Hague, where she leads the 'Geopolitics of Technology and Digitalisation' programme. She is also a Visiting Lecturer in the Master of Science in International Relations and Diplomacy (MIRD) programme of the University of Leiden.

Teun van der Laan is a Researcher and Data Analyst at the Netherlands Institute for International Relations 'Clingendael', within the 'Resilience' programme. His research focuses on population and big-data research, and the use of AI as a research method. Teun has a background in econometrics, political science, public administration and data science.

Christopher Houtkamp is a Senior Research Fellow at the Netherlands Institute for International Relations 'Clingendael' in The Hague, where he leads the 'Resilience' programme. His research focuses on societal polarisation, foreign interference and organised crime. Christopher is the project lead of the Clingendael 'Foreign Policy Barometer', Clingendael's population research project.

Disclaimer: This Policy Brief was originally published [in Dutch](#) in November 2025. The project was conducted for the Ministry of Economic Affairs of the Netherlands. The authors sincerely thank the partner organisations—FME, Techleap, VNO-NCW and Quantum Delta NL. Responsibility for the content rests solely with the authors.