The Netherlands DMARC & MTA-STS Adoption Report 2024

POWER DMARC

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- The Cybersecurity Assessment Netherlands (CSAN) 2024, prepared by the National Coordinator for Counterterrorism and Security (NCTV), provides important information on cybersecurity in the Netherlands.

- One of the key findings is that the government is creating a centralized cybersecurity organization by merging existing agencies and preparing to implement the NIS2 (European Network and Information Security) Directive. To boost crisis preparedness for attacks such as the one from China on computer networks of the Ministry of Defense, the ISIDOOR IV exercise among other measures has also been conducted.

- According to Pieter-Jaap Aalbersberg, National Coordinator for Counterterrorism and Security, one of the key findings of the CSAN is that "state actors are intensifying their cyber activities and broadening their capabilities." He also adds that "The pace and complexity of state cyber campaigns is being stepped up. They are also deploying hacker groups to carry out digital attacks."

Key Takeaways

- DMARC "reject" adoption is highest in the government sector and lowest in telecom, with low adoption across all sectors.

- 41.5% of Dutch domains lack a DMARC record, and only 0.9% have valid MTA-STS implementation.

- The transport sector lags in SPF and DMARC adoption, while the education sector leads in DMARC and MTA-STS implementation.

- 37.7% of domains in the Netherlands have DNSSEC enabled.

- Enhancing SPF, DMARC, MTA-STS, and DNSSEC implementation can improve email deliverability, domain reputation, and security.

- PowerDMARC offers automated, hassle-free solutions to streamline email authentication configuration.

Assessing the Threat Landscape

Our Netherlands DMARC and Email Authentication Adoption Report (2024) aims to give satisfactory answers to the following questions:

- Are SPF and DMARC correctly adopted in the Netherlands?

- What is the degree of correct MTA-STS adoption across different sectors?

- To what extent is DNSSEC enabled?

- How to reach a stronger cybersecurity framework in the Netherlands?
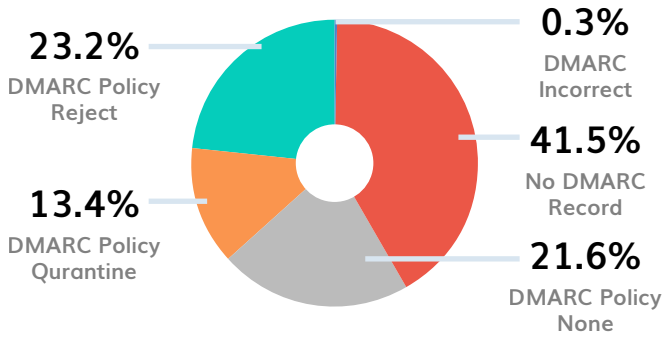
- What sectors are particularly vulnerable to cyber-attacks?

Sectors Analyzed

Total domains analyzed: 1152
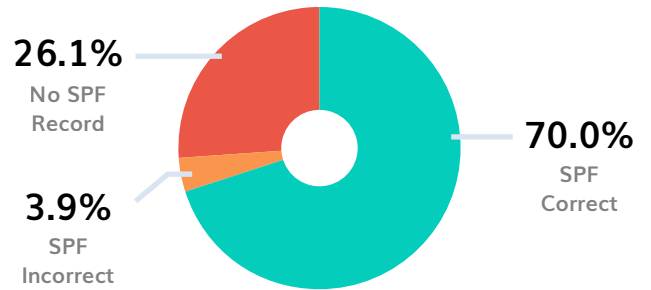
- Financial
- Media
- Government
- Transport

- Telecommunications
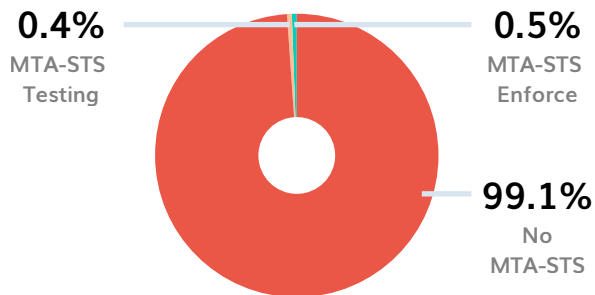- Healthcare
- Education

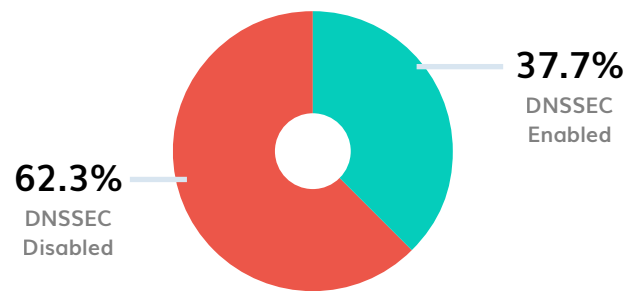# What Do the Numbers Say?

Netherlands DMARC Adoption Analysis

23.2%
DMARC Policy Reject

13.4%
DMARC Policy Qurantine

0.3%
DMARC Incorrect

41.5%
No DMARC Record

21.6%
DMARC Policy None

Netherlands SPF Adoption Analysis

26.1%
No SPF Record

3.9%
SPF Incorrect

70.0%
SPF Correct

Netherlands MTA-STS Adoption Analysis

0.4%
MTA-STS Testing

0.5%
MTA-STS Enforce

99.1%
No MTA-STS

Netherlands DNSSEC Adoption Analysis

62.3%
DNSSEC Disabled

37.7%
DNSSEC Enabled

Sector-wise Analysis of Domains in the Netherlands

Financial

DMARC Adoption
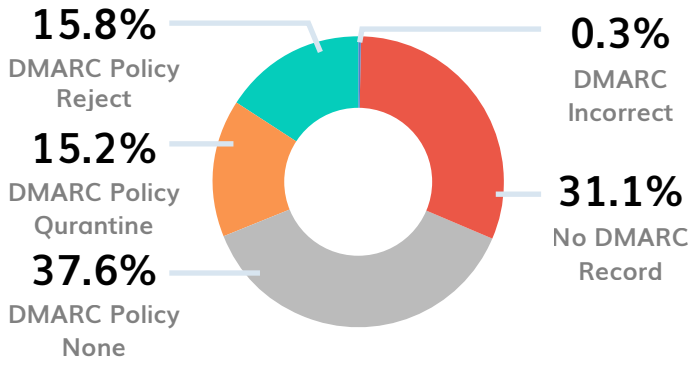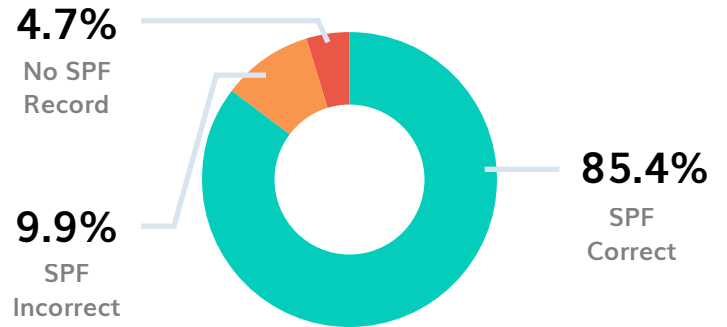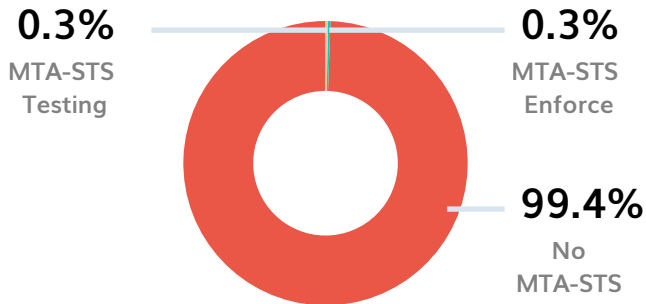
15.8%
DMARC Policy Reject

15.2%
DMARC Policy Qurantine

37.6%
DMARC Policy None

0.3%
DMARC Incorrect

31.1%
No DMARC Record

SPF Adoption

4.7%
No SPF Record

9.9%
SPF Incorrect

85.4%
SPF Correct

MTA-STS Adoption

0.3%
MTA-STS Testing

0.3%
MTA-STS Enforce

99.4%
No MTA-STS

DNSSEC Adoption

42.5%
DNSSEC Disabled

57.5%
DNSSEC Enabled

Media

DMARC Adoption

- **1.0%** DMARC Incorrect
- **40.0%** No DMARC Record
- **21.9%** DMARC Policy None
- **7.6%** DMARC Policy Qurantine
- **29.5%** DMARC Policy Reject

SPF Adoption

- **28.6%** No SPF Record
- **1.9%** SPF Incorrect
- **69.5%** SPF Correct

MTA-STS Adoption

- **100%** No MTA-STS

DNSSEC Adoption

- **54.3%** DNSSEC Disabled
- **45.7%** DNSSEC Enabled
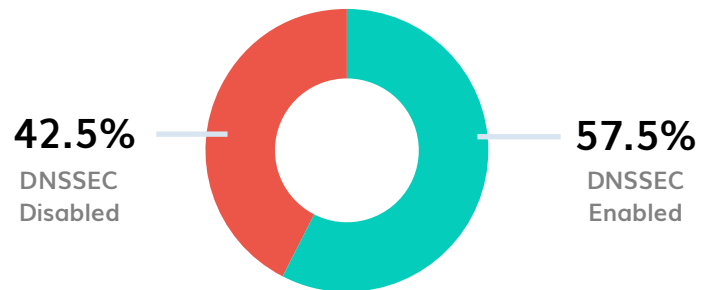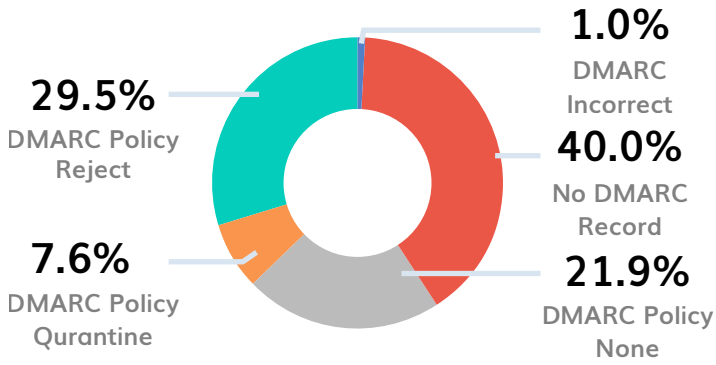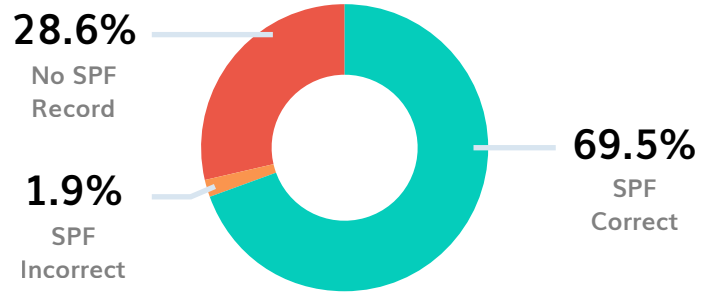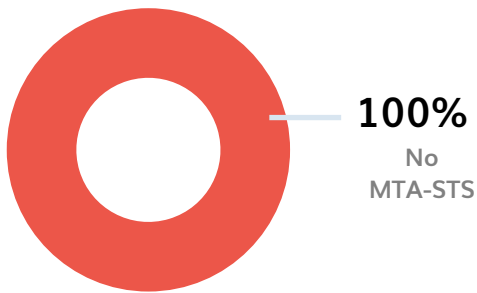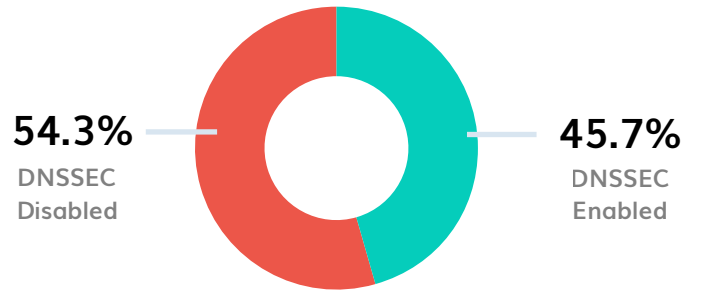
Government

DMARC Adoption

- **1.0%** DMARC Incorrect
- **21.1%** No DMARC Record
- **6.3%** DMARC Policy None
- **21.0%** DMARC Policy Qurantine
- **50.6%** DMARC Policy Reject

SPF Adoption

- **15.7%** No SPF Record
- **1.1%** SPF Incorrect
- **83.2%** SPF Correct

MTA-STS Adoption

- **1.1%** MTA-STS Testing
- **98.9%** No MTA-STS

DNSSEC Adoption

- **35.8%** DNSSEC Disabled
- **64.2%** DNSSEC Enabled
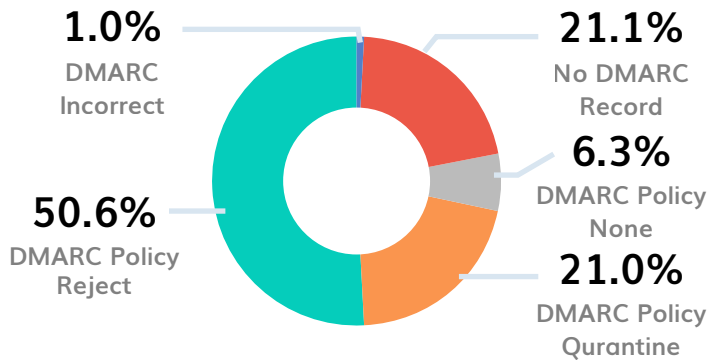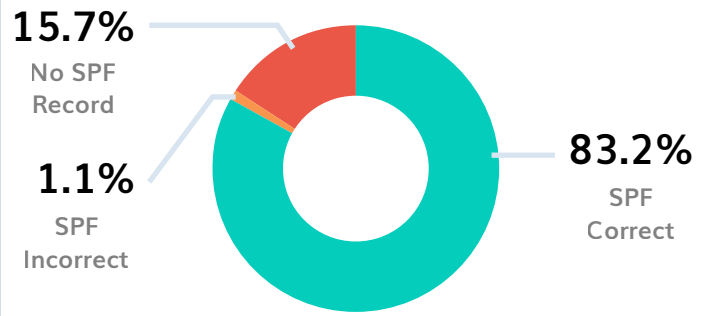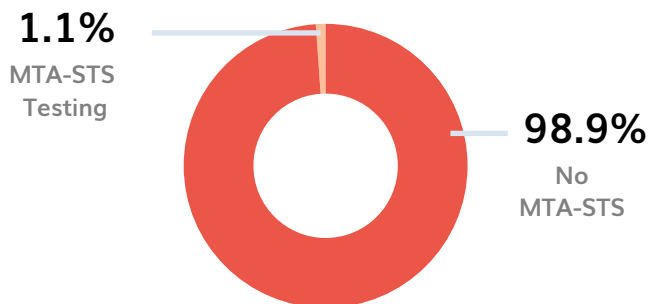
Transport

DMARC Adoption

17.2%
DMARC Policy Reject

4.6%
DMARC Policy Quarantine

13.4%
DMARC Policy None

64.8%
No DMARC Record

SPF Adoption

52.3%
No SPF Record

45.8%
SPF Correct

1.9%
SPF Incorrect

MTA-STS Adoption

0.9%
MTA-STS Testing

0.5%
MTA-STS Enforce

98.6%
No MTA-STS

DNSSEC Adoption

8.8%
DNSSEC Enabled

91.2%
DNSSEC Disabled
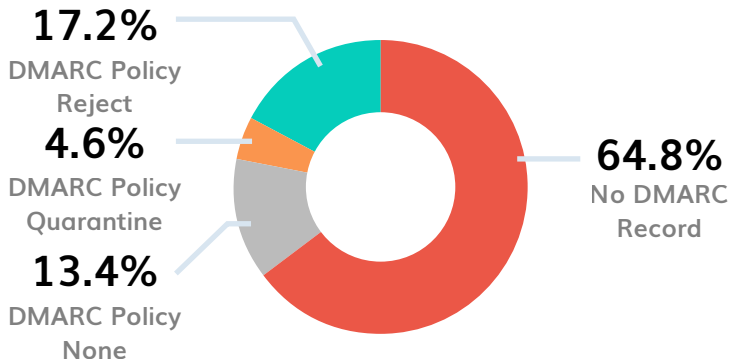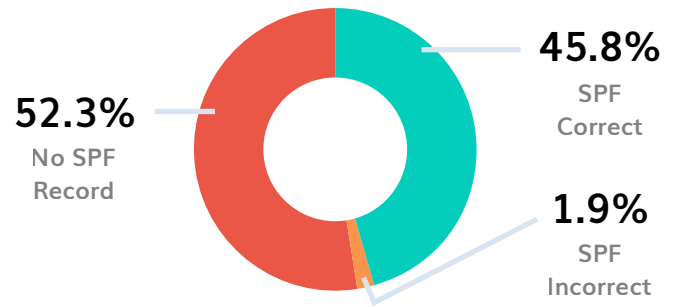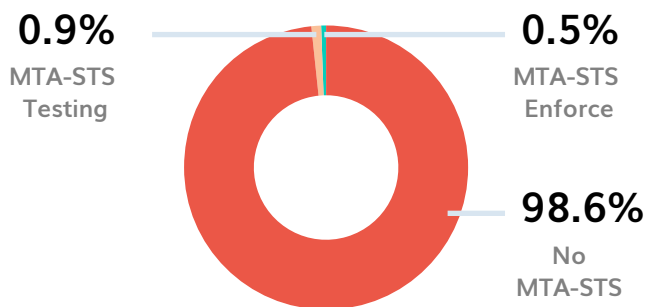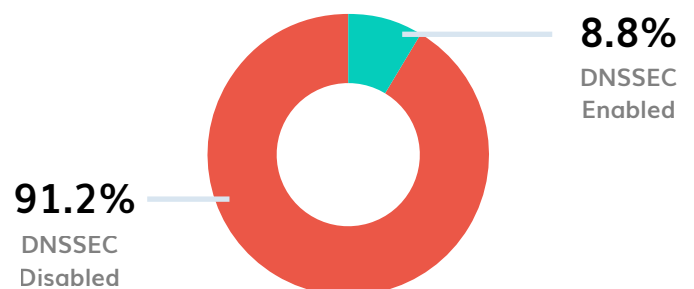
Telecommunications

DMARC Adoption

14.4%
DMARC Policy Reject

10.5%
DMARC Policy Quarantine

13.5%
DMARC Policy None

61.6%
No DMARC Record

SPF Adoption

45.4%
No SPF Record

52.4%
SPF Correct

2.2%
SPF Incorrect

MTA-STS Adoption

0.4%
MTA-STS Testing

99.6%
No MTA-STS

DNSSEC Adoption

15.3%
DNSSEC Enabled

84.7%
DNSSEC Disabled
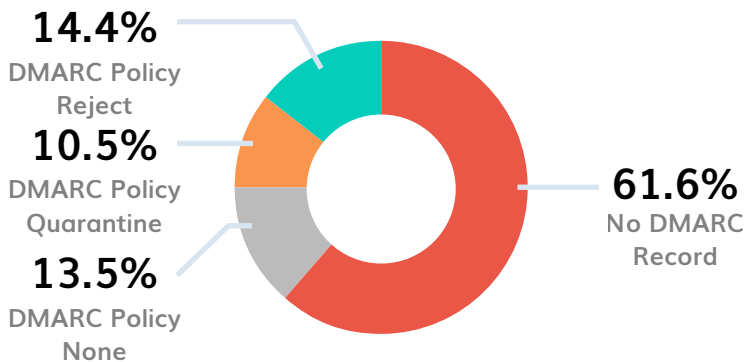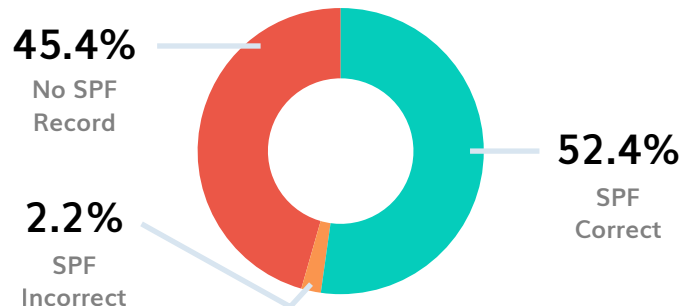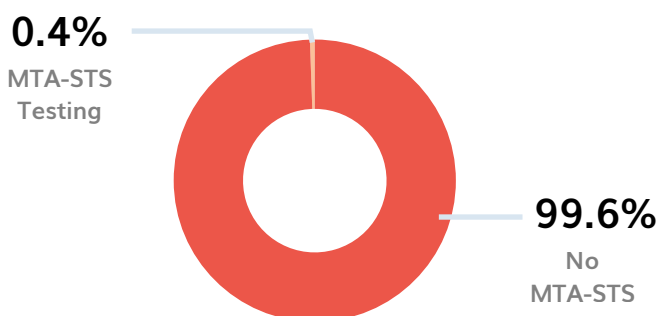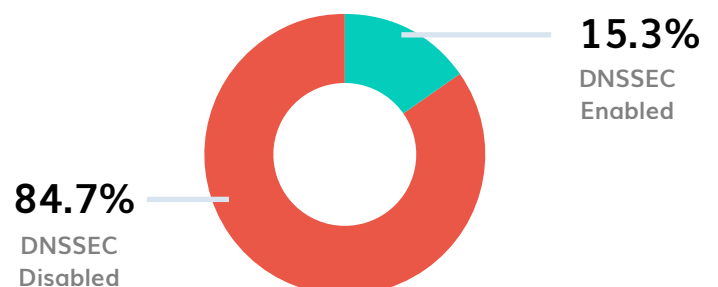
Healthcare

DMARC Adoption

32.2%
DMARC Policy Reject

25.3%
No DMARC Record

19.5%
DMARC Policy Quarantine

23.0%
DMARC Policy None

SPF Adoption

14.9%
No SPF Record

85.1%
SPF Correct

MTA-STS Adoption

1.1%
MTA-STS Enforce

98.9%
No MTA-STS

DNSSEC Adoption

39.1%
DNSSEC Disabled

60.9%
DNSSEC Enabled
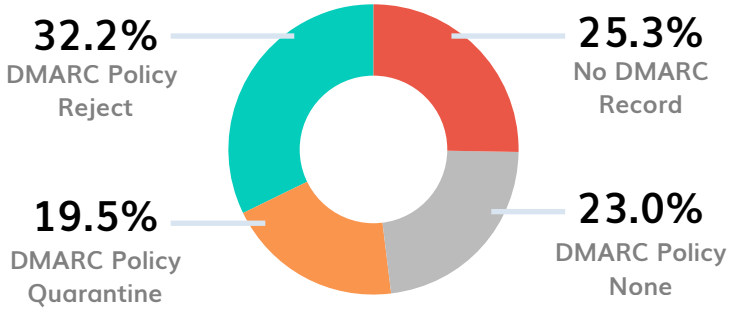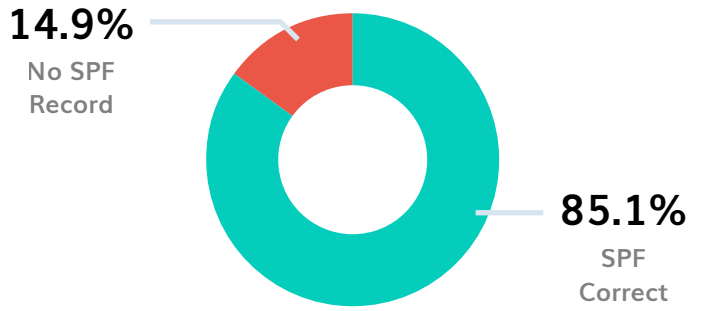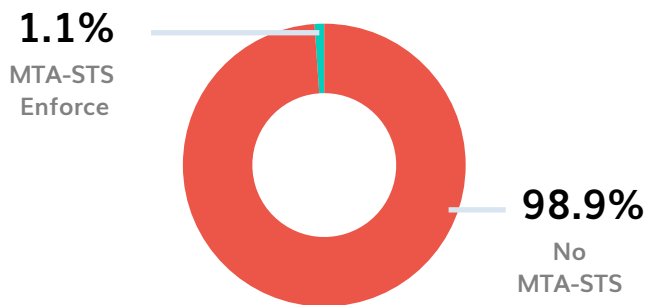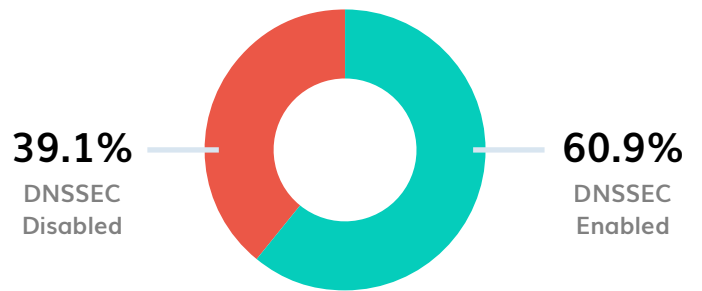
Education

DMARC Adoption

40.8%
DMARC Policy Reject

13.3%
No DMARC Record

26.5%
DMARC Policy Qurantine

19.4%
DMARC Policy None

SPF Adoption

10.2%
No SPF Record

1.0%
SPF Incorrect

88.8%
SPF Correct

MTA-STS Adoption

2.0%
MTA-STS Enforce

98.0%
No MTA-STS

DNSSEC Adoption

66.3%
DNSSEC Disabled

33.7%
DNSSEC Enabled
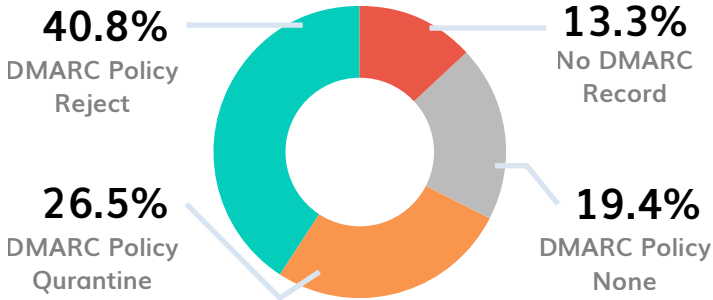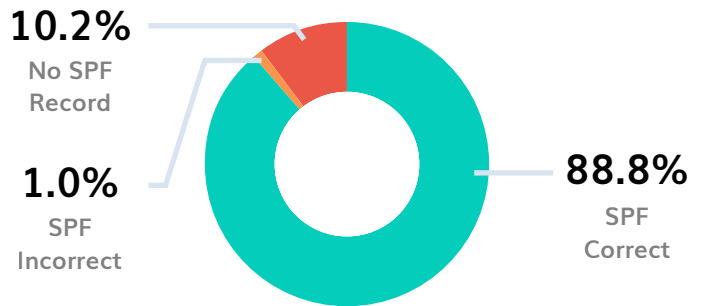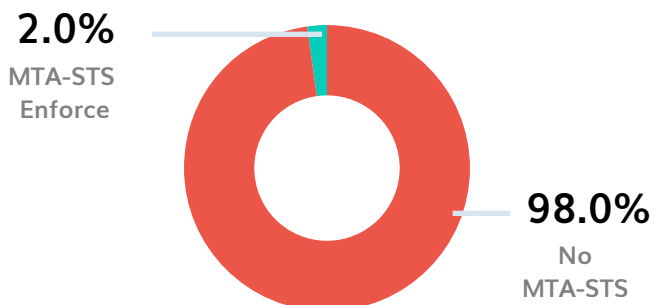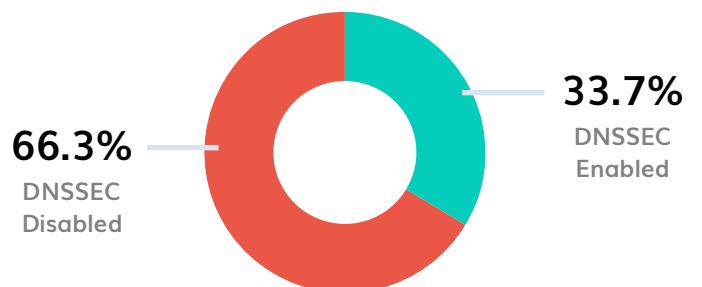
Comparative Analysis of SPF Adoption among Different Sectors in the Netherlands

% SPF Adoption

Sector	No SPF Record	SPF Incorrect	SPF Correct
Financial	4.66%	9.94%	85.40%
Media	28.57%	1.91%	69.52%
Government	15.79%	1.05%	83.16%
Transport	52.31%	1.86%	45.83%
Telecom	45.41%	2.19%	52.40%
Healthcare	14.94%		85.06%
Education	10.20%	1.02%	88.78%

■ SPF Correct　■ SPF Incorrect　■ No SPF Record
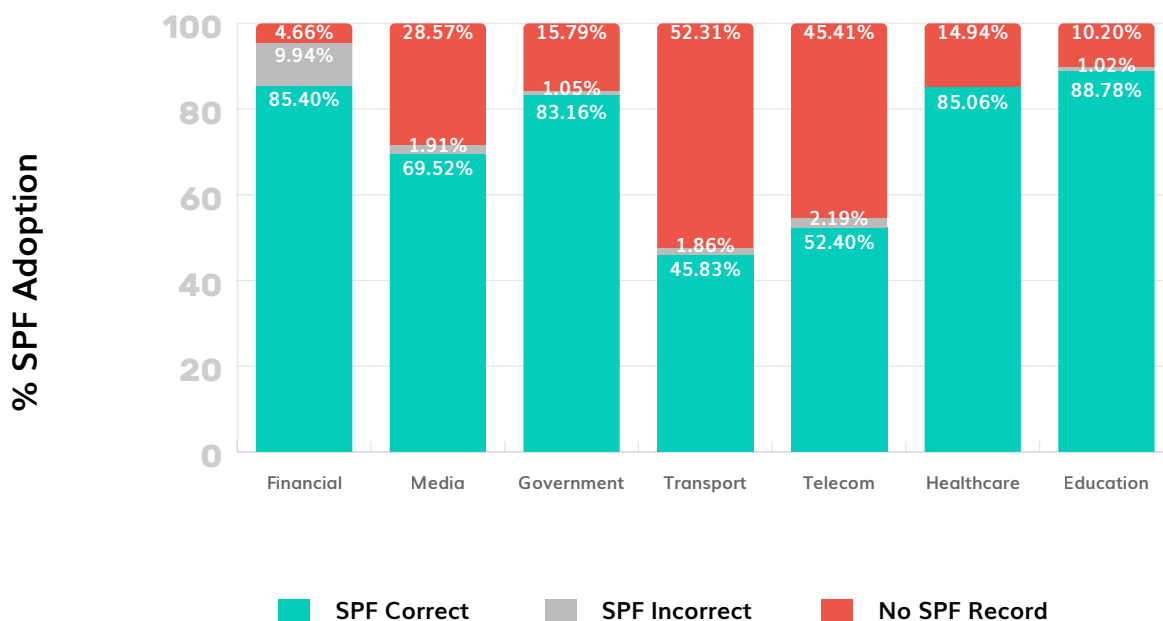
Comparative Analysis of DMARC Adoption among Different Sectors in the Netherlands

% DMARC Adoption

Sector	DMARC Policy Reject	DMARC Policy Quarantine	DMARC Policy None	No DMARC Record	DMARC Incorrect
Financial	15.84%	15.22%	37.58%	31.06%	0.30%
Media	29.52%	7.62%	21.90%	40.0%	0.94%
Goverment	50.53%	21.05%	6.32%	21.05%	1.05%
Transport	17.13%	4.63%	13.43%	64.81%	
Telecom	14.41%	10.48%	13.54%	61.57%	
Healthcare	32.18%	19.54%	22.99%	25.29%	
Education	40.82%	26.53%	19.39%	13.26%	

■ DMARC Policy Reject　■ DMARC Policy Quarantine　■ DMARC Incorrect
■ DMARC Policy None　■ No DMARC Record

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Comparative Analysis of MTA-STS Adoption among Different Sectors in the Netherlands

	Financial	Media	Government	Transport	Telecom	Healthcare	Education
MTA-STS Testing	0.31%		1.05%	0.93%	0.44%	1.15%	2.04%
MTA-STS Enforce	0.31%			0.46%			
No MTA-STS	99.38%	100%	98.95%	98.61%	99.56%	98.85%	97.96%

Legend:
- MTA-STS Enforce
- MTA-STS Testing
- MTA-STS None
- No MTA-STS
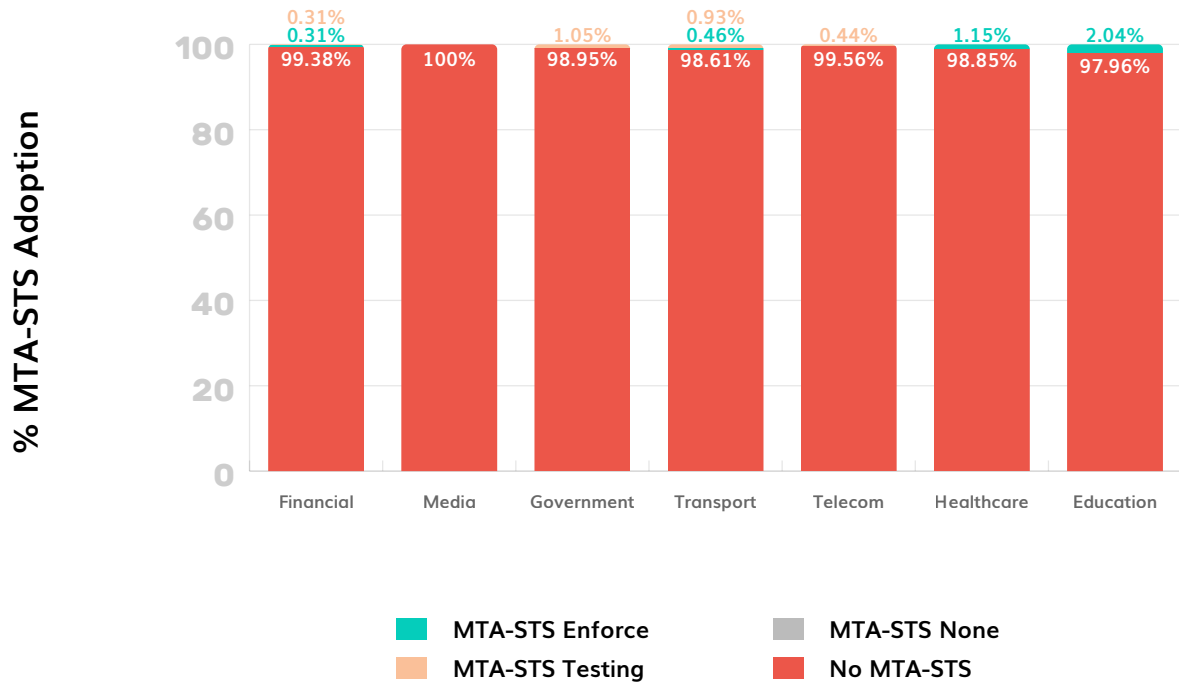
Comparative Analysis of DNSSEC Adoption among Different Sectors in the Netherlands

	Financial	Media	Goverment	Transport	Telecom	Healthcare	Education
DNSSEC Disabled	42.55%	54.29%	35.79%	91.20%	84.72%	39.08%	66.33%
DNSSEC Enabled	57.45%	45.71%	64.21%	8.80%	15.28%	60.92%	33.67%

Legend:
- DNSSEC Enabled
- DNSSEC Disabled

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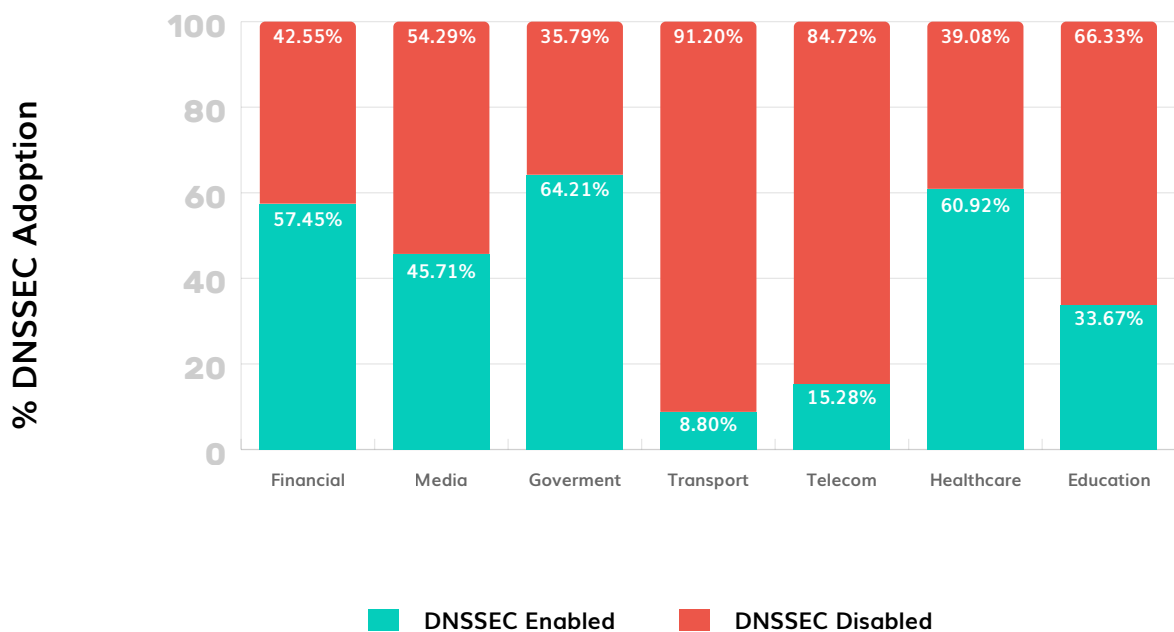
DMARC & MTA-STS Adoption Rates:
Key Statistics for the Netherlands

▶ 70% of Dutch domains have correct SPF records.

▶ 41.5% of Dutch domains have no DMARC record.

▶ 23.2% of the analyzed domains have their DMARC policies set to "reject."

▶ 21.6% of domains that have DMARC implemented have their policies set to "none" which does not protect against attacks.

▶ Only 0.9% of domains have valid MTA-STS implementation.

▶ 37.7% of domains have DNSSEC enabled, leaving 62.3% of domains vulnerable.

Critical Errors Organizations in the Netherlands Are Making

1 The transport sector has the lowest adoption rate with 52.31% of domains lacking SPF records. The education sector performs best with only 4.7% lacking SPF records.

2 The education sector has the highest DMARC adoption rate (86.73%) with valid configurations. The transport sector has the lowest adoption for DMARC (35.19%).

3 The adoption of strict DMARC policies (i.e., "reject") is relatively low across all sectors. The government sector has the highest adoption rate at 50.6%. The telecom sector has the lowest adoption rate of the DMARC "reject" policy at 14.41%.

4 MTA-STS adoption is very low across all sectors. The education sector has the highest adoption rate, with 2.04% of domains having valid MTA-STS implementation.

5 The government sector has the highest adoption rate of DNSSEC at 64.21%. The transport sector has the lowest DNSSEC implementation at 8.80%.

How Can Organizations in the Netherlands Improve Email Security & Deliverability?

1 Organizations in sectors with lower SPF adoption rates, particularly the transport and telecommunications sectors, should prioritize implementing correct SPF records for their domains.

2 Organizations in the Netherlands should focus on correctly implementing DMARC policies, and making a gradual transition toward stricter policy modes like "quarantine" or "reject". This will improve their defenses against email-based threats like spoofing and phishing over time.

3 Domain owners in the Netherlands should prioritize correctly configuring email authentication protocols. This includes:

- ▶ Generating error-free DMARC, SPF, and MTA-STS record syntaxes
- ▶ Avoid configuring multiple DMARC and SPF records for a single domain
- ▶ Optimizing their SPF records to not exceed the 10 DNS lookup limit

4 Organizations, especially those in the education and transport sectors, should prioritize enabling DNSSEC to prevent DNS spoofing attacks.

5 Organizations (especially those in the media sector) should significantly increase efforts to include MTA-STS in their email security stack.

How Can PowerDMARC Help?

PowerDMARC offers full-stack email authentication SaaS services for businesses of different sizes. Our cloud-based platform combines DMARC, SPF, DKIM, BIMI, MTA-STS, and TLS-RPT hosted solutions for easy protocol configuration and management.

We aim to make email authentication & domain security accessible, affordable, and hassle-free for organizations, MSPs, MSSPs, governments, and non-profits worldwide. Thanks to PowerDMARC, phishing attacks, spoofing, and domain abuse will have a lower likelihood of successfully reaching or infecting your domain and data.

Contact us today at support@powerdmarc.com and effectively boost your deliverability with secure, compliant, and authenticated emails!

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