

Work with the Dutch to create
smart, sustainable solutions for
a more liveable, prosperous and
secure world.

Facts and Figures, 2nd edition 2017

Holland Compared

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Source: Holland Toolkit



Source: Hollandse Hoogte

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Colophon



This is the Netherlands

The Dutch shaped their land and the land in turn shaped their mindset and approach to solving tomorrow's challenges. Partnership and innovation is in the Dutch DNA. Together with partners around the world, they create sustainable solutions for food and water security, clean energy, and liveable and secure societies. The Dutch highly value their traditions while keeping an open mind to exploring new opportunities and embracing new challenges. They constantly seek collaborations to find the smartest solutions, looking beyond cultural and technological horizons.



About the Netherlands

Official name

Kingdom of the Netherlands

Form of government

Constitutional monarchy, parliamentary democracy

Head of State

His Majesty King Willem-Alexander, King of the Netherlands, Prince of Orange-Nassau

Capital

Amsterdam

Seat of government

The Hague

Administrative structure

Twelve provinces and the overseas territories of Aruba and Curaçao and St. Martin. The overseas islands of Bonaire, Saba and St. Eustatius, all three of which are situated in the Caribbean, are 'special municipalities of the Netherlands'

Surface area

33.800 km²

Location

Western Europe, by the North Sea, bordering Belgium and Germany

Number of inhabitants

17.101.000 (February 2017)

Number of inhabitants per km²

502 (February 2017)

Monetary unit

Euro

Languages

Dutch, Frisian



Source: Hollandse Hoogte

Foreword

Where Tradition and Innovation Are One

The economy of the Netherlands has a strong international orientation, and is one of the European Union's most dynamic trading and industrial hubs. We have one of the world's most open and prosperous economies and the Dutch engage in countless forms of business around the globe.

In recent years the Netherlands has gone from strength to strength, making it one of the 10 most competitive countries worldwide. In the past year it rose from fifth to fourth place in the Global Competitiveness Index published by the World Economic Forum. As the world's fifth-largest exporter, second-largest exporter of agri-food products and eighth-largest foreign investor, our country occupies a prominent position in world trade.

Although a small country, the Netherlands punches above its weight in world business and politics. It has a thriving service sector and boasts outstanding achievements in science, engineering and industries like electronics, food, flowers, chemicals and water technology.

Where did the Dutch get their attitude for business and innovation? Our country is situated in a low-lying delta at the confluence of three major rivers, so we have always lived in a challenging and risk-laden environment. We readily embrace new ideas and techniques, and we have an ethos of boldly going where no one has gone before and making things happen.

One of the new challenges we face today, which also calls for innovation, is creating a sustainable economy. In a circular economy, the Netherlands will deal with its resources in a much smarter way. We will use and consume as little as possible, and maximise the recycling of raw materials. We will develop more durable products and find new, smart ways to produce them. And we will use them more intelligently by sharing and reusing them. In this way we will build a circular economy together.



By 2050, we aim to make this circular economy a reality in the Netherlands. By developing cutting-edge, high-tech solutions in labs and clean rooms. By working with nature to optimise water management. And by supporting the start-ups of talented young entrepreneurs. Fostering sustainable economic growth in all these ways will ensure we achieve our objective: a circular economy.

Both at home and abroad, the Dutch welcome the opportunity to meet and work with new business partners. So by way of introduction, we are pleased to present the Netherlands through this new edition of Holland Compared.

A handwritten signature in purple ink, consisting of a series of loops and a long horizontal stroke extending to the right.

Yoka Brandt

Secretary-General of the Ministry of Foreign Affairs

1. Macro Indicators

As the sixth-largest EU economy, the Netherlands continues to perform well on many economic fronts. For example, the Netherlands has one of the highest incomes per capita in the EU, relatively low unemployment and moderate inflation.

Source: Hollandse Hoogte

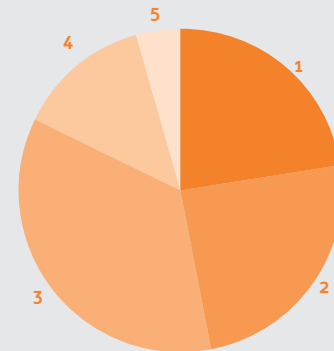


Source: NBTC

Population by Age

In total, 17 million people live on the relatively small piece of land that is the Netherlands, which makes the country one of the most densely populated in the world. However, population growth is slowing down in the Netherlands, as it is in many other Western countries. This slowdown, together with an increasingly healthy generation aged 65 and above, has resulted in an ageing population.

Population by age (2015)



1	0-19	22.7%	4	65-79	13.4%
2	20-39	24.5%	5	Older than 79	4.3%
3	40-64	35.1%			

Source: Statistics Netherlands 2016.

Attractive Place to Live

Whether visiting for business or pleasure, the Netherlands offers a highly pleasant living environment. Leisure amenities are within easy reach and Dutch cities have much to offer, such as the centuries-old architecture, cultural activities and world-famous museums such as the Van Gogh Museum and the Hermitage Amsterdam. Housing is fairly affordable, according to IMD. In addition to the various international schools in the Netherlands, a large and growing number of schools (130 in 2015) teach in two languages, Dutch and English. According to the Commonwealth Fund, Dutch healthcare is the best in the world in terms of quality, access, efficiency, funding and the healthy lives, on average, of the general population. The Swedish think-tank Health Consumer Powerhouse (2017) considers the Dutch healthcare system as outstanding (#1) compared to European counterparts.

Quality of life (2015)

1	Switzerland	9.73
2	Austria	9.57
3	Norway	9.51
4	New Zealand	9.38
5	Canada	9.36
6	Denmark	9.31
7	Australia	9.25
8	Netherlands	9.24
9	Germany	9.21
10	Sweden	9.17

Source: IMD, 2016.

Competitive Economy

According to a number of international league tables published by renowned institutes such as IMD and the World Economic Forum, the Netherlands is among the world leaders when it comes to favourable business climate. There are numerous factors that form the basis for the favourable position that the Netherlands enjoys, including its open and international outlook, its strategic location in Europe, its well-educated, multilingual and flexible workforce, and the high level of labour productivity. The competitive fiscal climate, top-level physical and technological infrastructure and quality of life are key contributors to the country's success. The Netherlands is thus an attractive location for companies seeking a European base and for those wishing to invest.

Global Competitiveness Index (2016-2017)

1	Switzerland	5.81
2	Singapore	5.72
3	United States	5.7
4	Netherlands	5.57
5	Germany	5.57
6	Sweden	5.53
7	United Kingdom	5.49
8	Japan	5.48
9	Hong Kong, China	5.48
10	Finland	5.44

Source: World Economic Forum, 2016.

Sixth-largest EU Economy

In terms of surface area and population size, the Netherlands is not a particularly large country and ranks 134th and 65th worldwide. In stark contrast, the country's economic performance ranks much higher. The size of the economy, or the Gross Domestic Product (GDP), is 679 billion Euros in 2015. The Netherlands has the seventeenth-largest economy in the world and the sixth-largest in the European Union.

GDP in the EU (2016)

1	Germany	3,132,670
2	United Kingdom	2,366,912
3	France	2,225,260
4	Italy	1,672,438
5	Spain	1,113,851
6	Netherlands	697,219
7	Sweden	462,417
8	Poland	424,269
9	Belgium	421,611
10	Austria	349,493

Millions of euros.
Source: Eurostat, 2016.

High Average Income

The Netherlands is one of the wealthiest nations in the European Union. The Dutch GDP per person employed is 48,326 US dollars (The Conference Board, 2015), compared to the EU average of 37,829 US dollars. The high average income of the Dutch is the result of high labour productivity and a high level of labour participation.

GDP per capita (2015)

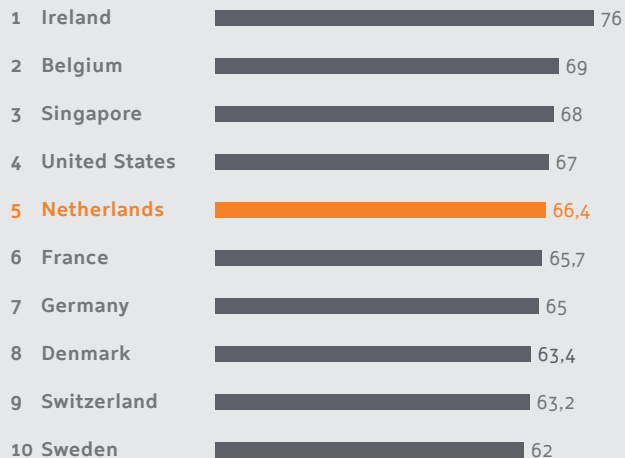
1	Luxembourg	102,101
2	Ireland	65,122
3	Switzerland	61,041
4	United States	56,065
5	Netherlands	48,326
6	Austria	48,091
7	Germany	47,221
8	Sweden	46,702
9	Denmark	46,574
10	EU-28	37,829

US dollars, corrected for Purchasing Power Parity.
Source: OECD, 2016.

High Productivity

The working population in the Netherlands is highly educated, employees have an international outlook, and many speak more than one foreign language. This high level of education and the strong economic structure (enabled by the physical and the knowledge infrastructure, for example) allow employees to be productive. Labour productivity per hour is among the highest in the world. It is noteworthy that the Netherlands has combined this high level of productivity with a high level of labour participation, also among semi-skilled and unskilled workers.

GDP per hour, corrected for purchasing power parity (2016)



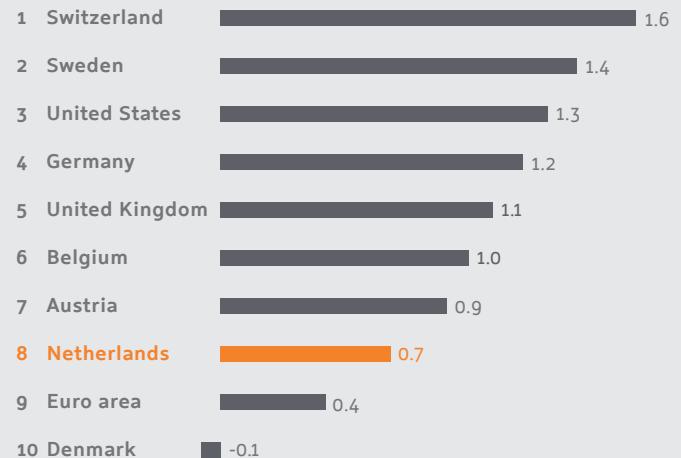
US dollars.

Source: The Conference Board, 2017.

Prosperous, Sustainable and Enterprising

Compared to many other EU Member States, the Netherlands has a highly open economy. The structural reforms that have been implemented in areas such as the labour market and the social security system, have created conditions for potentially healthy economic growth. The Dutch economic climate offers room for investments in knowledge and innovation, for example, so that the Netherlands will remain a prosperous, sustainable and enterprising nation.

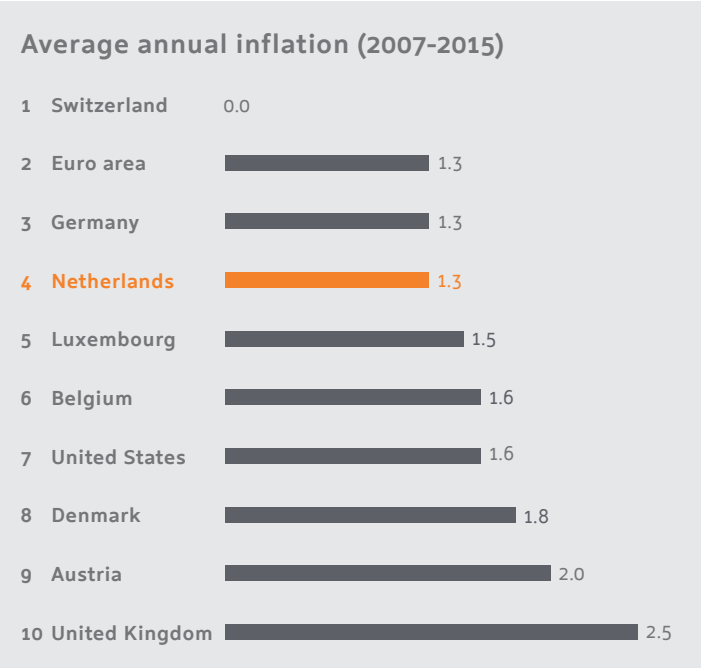
Growth in GDP in % (2007-2015)



Source: OECD, 2016.

Moderate Inflation

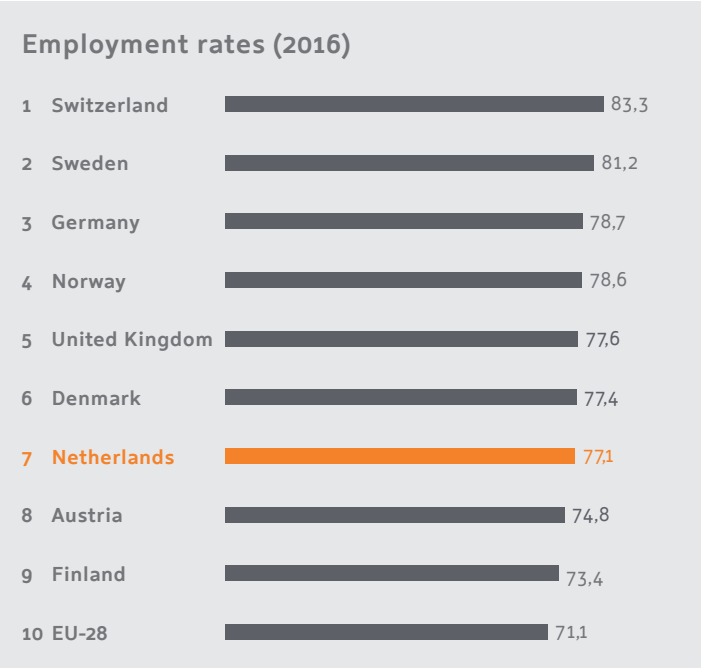
The Netherlands enjoys a good reputation in monetary terms. Long before the introduction of the euro, price rises in the Netherlands were at a moderate level, thanks to sound monetary policies on the part of DNB (the Dutch Central Bank). The product and labour markets also operate relatively well, which helps to moderate price increases. According to the IMD (2016), the Netherlands ranks fifth worldwide in the fight against unfair competition.



Average annual price increases as a percentage.
Source: OECD, 2016.

High Labour Participation Rate

The strong growth in jobs in the Netherlands is largely due to the structural economic reforms that have been implemented. The relative stability of the labour market – there are relatively few strikes in the Netherlands – can also be attributed to the favourable business climate. The labour participation rate is considerably greater than the average of the OECD and Euro zone countries.

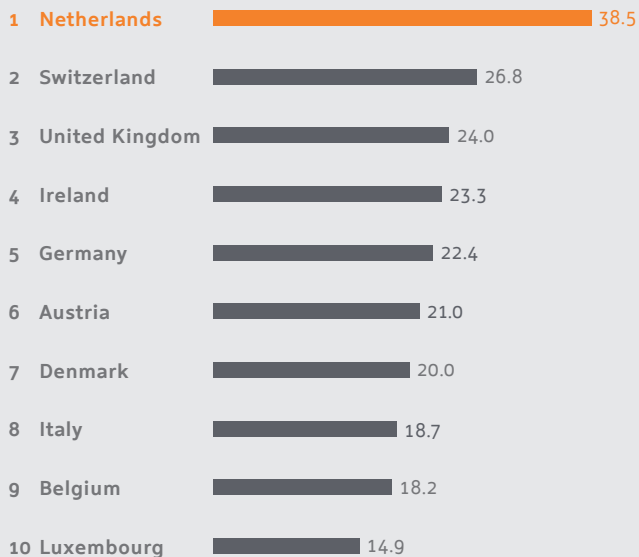


Source: Eurostat, 2017.

Many Part-time Employees

From an international perspective, a relatively high proportion of the Dutch working population works part-time. This is often a deliberate decision, allowing employees to combine work with caring for their family. Nearly 75% of Dutch part-time workers are women. Nevertheless, the average working week for full-time employees is more or less on par with most other Eurozone countries. The same applies for the number of hours worked in a year by full-time employees.

Part-time work (2015)

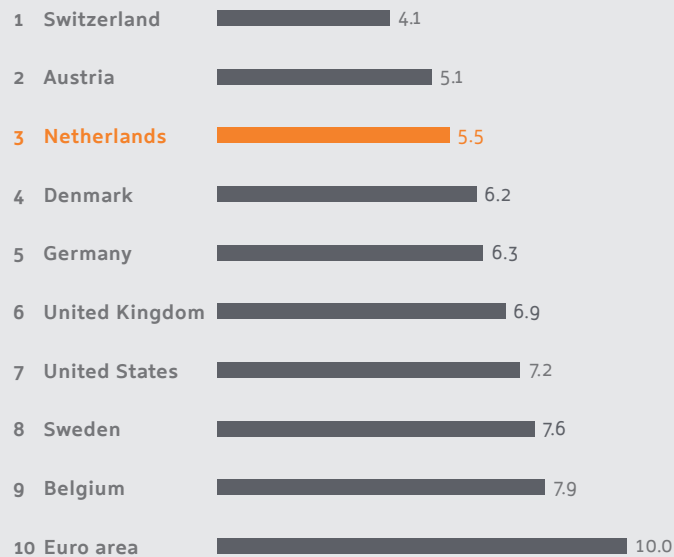


Measured as a percentage of employment as a whole. Source: OECD, 2016.

Relatively Low Unemployment

The rate of unemployment in the Netherlands is one of the lowest in Europe. From 2007 to 2015, an average of 5.5% of the potential working population was unemployed, while the corresponding rate in the euro countries was 10.0%. In March 2017 it amounted to 5.1% (Eurostat, 2017), compared to an average of 9.5% in the euro countries. Moreover, youth unemployment is also still low in the Netherlands. In March 2017, the portion of Holland's potential working population aged under-25 that was unemployed amounted to 9.6%. In the euro countries, the average was 19.4%.

Average unemployment (2007-2015)

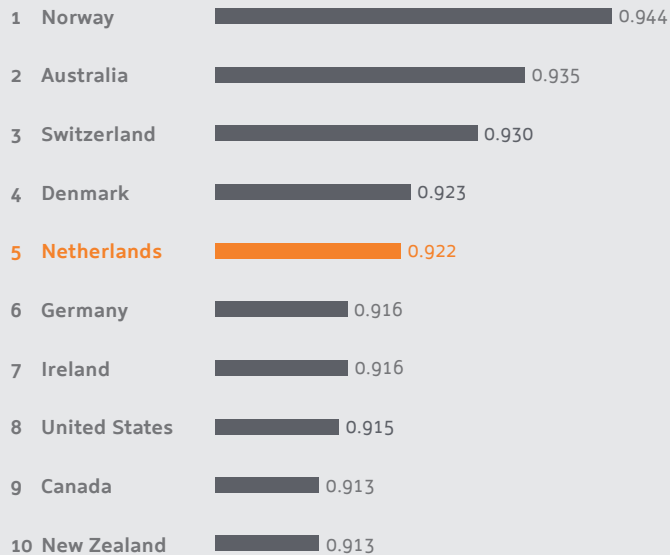


Measured as a percentage of the working population. Source: OECD, 2016.

Fifth Most Prosperous Country

According to the UNDP, the Netherlands is the fifth most prosperous country in the world. In determining 'prosperity', the UNDP takes into account a country's GDP as well as other aspects of human well-being, such as life expectancy, public health, literacy levels and educational standards. The Netherlands ranks fifth out of a total of 188 countries listed in the UNDP index.

Human Development Index (2015)



Source: United Nations Development Programme, 2015.



Source: Holland Toolkit

2. Trade and Foreign Investment

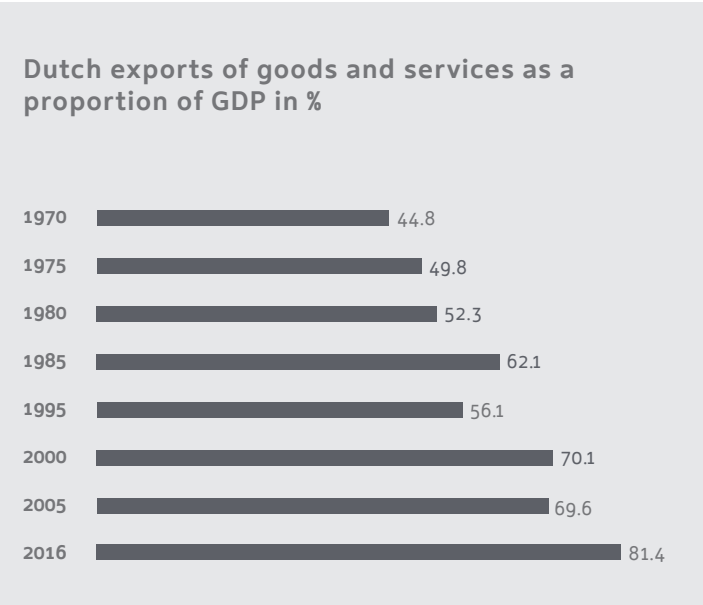
Source: KLM Dutch Royal Airlines

The Netherlands plays a prominent role in the world economy due to its exports, imports and inbound and outbound foreign investment. Its favourable location in relation to the European hinterland and its world-class infrastructure – such as the Port of Rotterdam and Amsterdam Schiphol Airport – have made the Netherlands an important global distribution centre and an attractive location for international companies.



Open Economy

The Netherlands has traditionally always had an open economy and the level of trade with other countries is very significant. According to research carried out by the Netherlands Bureau for Economic Policy Analysis, the total value of Dutch exports was 81.4% of the Netherlands' GDP. A large portion of this export is transshipment of goods, such as oil, which come into the Netherlands and are exported again. In total, the Netherlands earns one third of its income with export.



Measured as a percentage of GDP. Source: CPB, 2016.

World's Fifth-largest Exporter of Goods

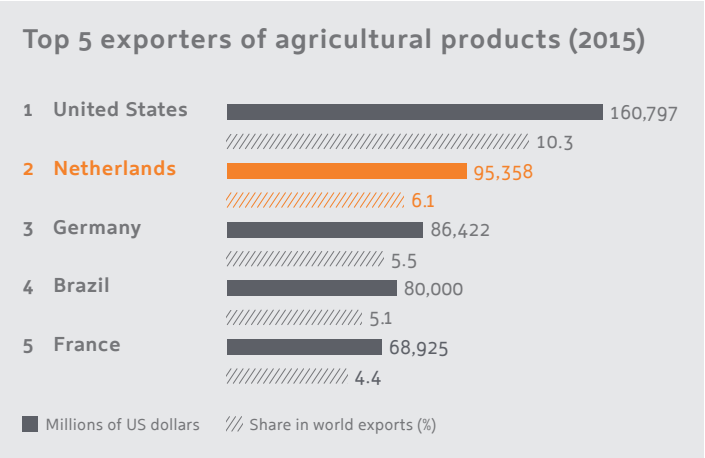
As the fifth-largest exporter of goods in the world, the Netherlands occupies a prominent position when it comes to world trade. In 2016, the Netherlands exported goods worth a total of almost 569 billion US dollars, which is about 3.6% of the world's total exports. The Netherlands is also a significant exporter of commercial services - exports of commercial services amounted to 180 billion US dollars (162 billion Euros) in 2015, which placed the country sixth in the world rankings.



Source: International Trade Organisation, 2017.

Strong in Agri-food Production

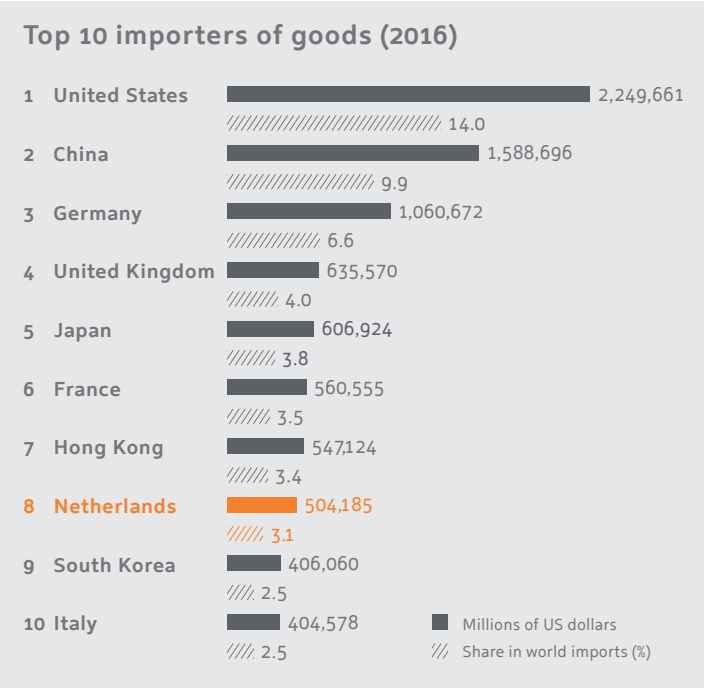
The Netherlands is the world's second-largest exporter of agri-food products. For decades, the Dutch agriculture sector has succeeded in maintaining its lead over international competitors through continual investment in innovation in agri-food value chains. The Netherlands is a hotbed of R&D in the area of agri-food, due largely to the excellent knowledge infrastructure and close collaborations between knowledge institutes, government and the private sector, the so-called "golden triangle". Key R&D centres include Wageningen University and Research Centre (WUR), the Top Institute Food & Nutrition and the public-private innovation program FND+. Some 12 out of the 40 largest Food & Beverage companies in the world have R&D facilities located in the Netherlands. WUR is the foremost university in Europe in the field of agriculture, and second in the world, according to the Higher Education Evaluation & Accreditation Council of Taiwan.



Source: World Trade Organisation, 2016.

Major Importer of Goods and Services

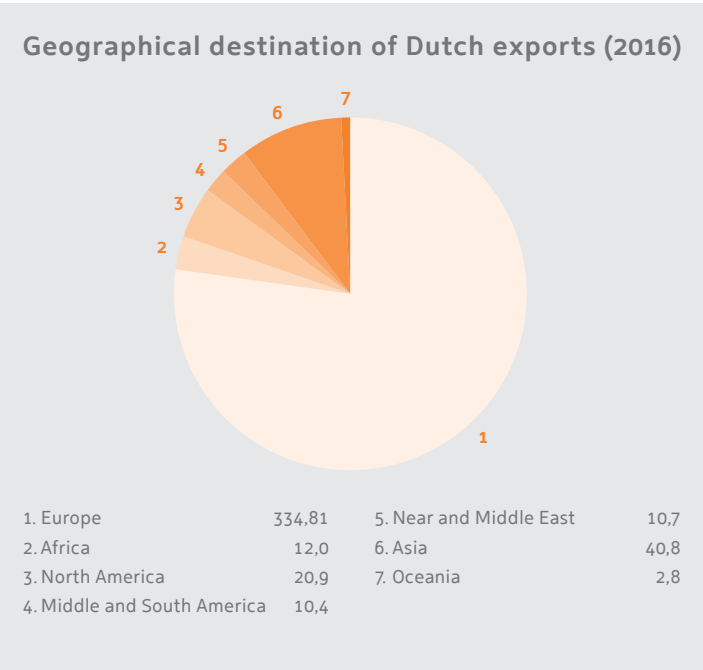
As well as being a major exporter, the Netherlands also imports large quantities of goods: 504 billion-US-dollars-worth in 2016. With a 3.1% share of the global total, the country is the eight-largest importer of goods in the world. The Netherlands is also a significant importer of commercial services - imports of commercial services amounted to 173 billion US dollars (157 billion Euros) in 2015, which placed the Netherlands seventh in the world rankings.



Source: International Trade Organisation, 2017.

Significant Trading Partner: Western Europe

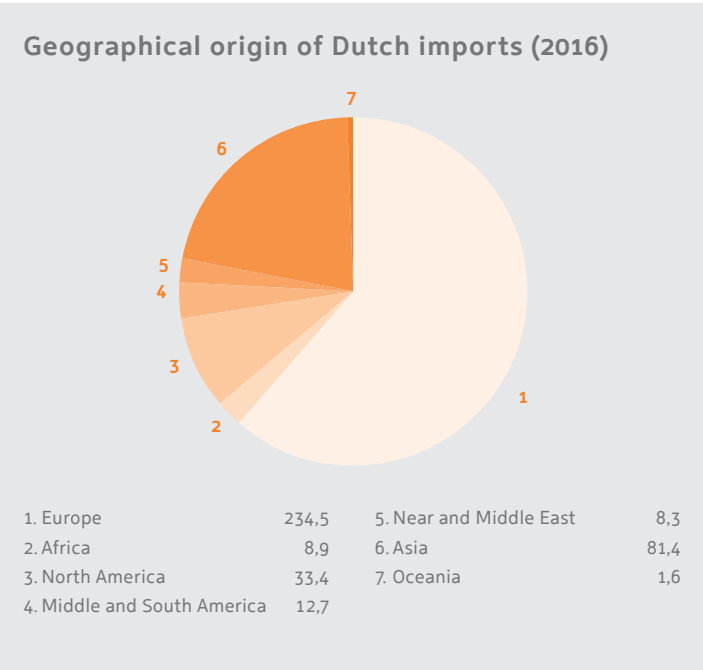
The role of the Netherlands as a key distribution location is also indicated by the volume of import and export activities. Almost 79% of Dutch exports remain within Europe, especially Western Europe. Germany is easily the Netherlands' most significant trading partner, followed by Belgium, the United Kingdom and France.



Values in billions of euros.
Source: Statistics Netherlands, 2017.

Gateway to Europe

The Netherlands has become a key hub for distribution in Europe because of its favourable location in relation to the European hinterland and the country's world-class air and sea ports such as the Port of Rotterdam (Europort) and Amsterdam Airport Schiphol. The Netherlands is home to more distribution centres than anywhere else in Europe and has the largest inland shipping fleet in Europe.



Values in billions of euros.
Source: Statistics Netherlands, 2016.

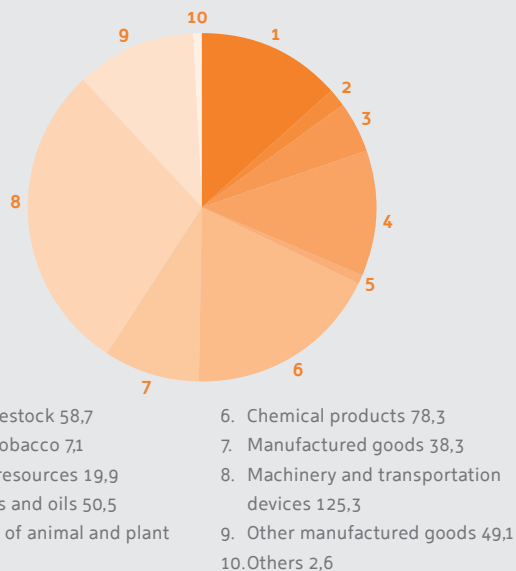
Dutch Paints Add a Touch of Colour to the World

The Netherlands is the second-largest exporter of agricultural products worldwide, after the United States. Horticulture is by far the most important segment within the agricultural sector. Other significant Dutch exports include chemical products (e.g. Sikkens paint), machinery (e.g. ASML lithography systems) and vehicles (DAF trucks and Scania trucks). The Netherlands is also a well-known exporter of high-quality aerospace components and systems (Fokker), ships (IHC Merwede), yachts (Royal Van Lent Shipyard) and busses and car parts (VDL Group).

Biggest Trading Partner: Germany

In 2016, 17.6% of all imports into the Netherlands originated in Germany. Almost half of all products purchased by the Netherlands in Germany were related to chemical products and machinery. Of all of the cars imported into the Netherlands, more than 90% came from Europe, particularly Belgium, France and Germany. Belgium (9.8% of total imports of goods) and China (9.1%) were respectively second and third Dutch import partner.

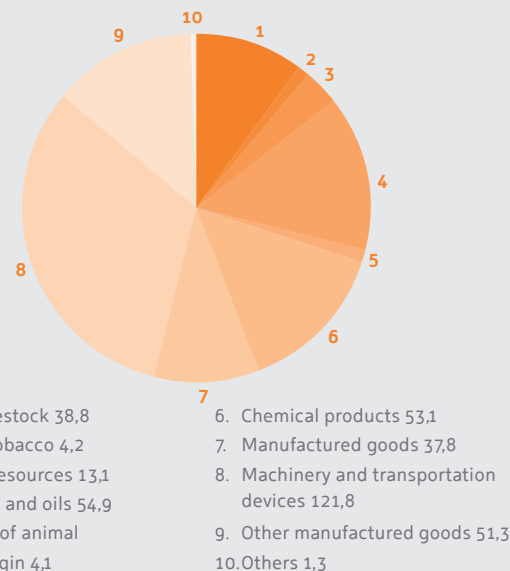
Composition of Dutch exports (2016)



Values in billions of euros.

Source: Statistics Netherlands, 2017.

Composition of Dutch imports (2016)



Values in billions of euros.

Source: Statistics Netherlands, 2017.

Major Global Foreign Investor

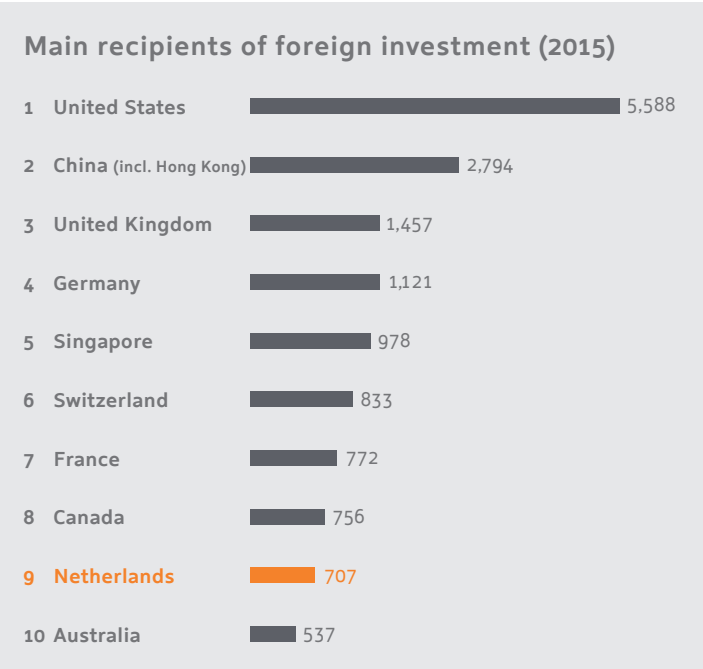
Dutch businesses are truly international in their orientation. Dutch-based multinationals, such as AkzoNobel, Heineken, KPN, ING, Philips, Rabobank, Unilever and Shell have made substantial foreign investments in the past. The total amount of Dutch investments in other countries is considerable. In late 2015, investments overseas totaled in excess of 1.074 billion US dollars, making the country the ninth-largest foreign investor in the world. According to the Dutch central Bank (DNB) Dutch investment amounted 1.019 billion Euros in 2015 (DNB, 2016).



Most important foreign investors in the world, in billions of US dollars.
Source: UNCTAD 2016.

Attractive for Inbound Foreign Investments

In 2015, foreign companies made inward direct investments in the Netherlands worth 707 billion US dollars, making the Netherlands the world's ninth-largest recipient of foreign investment. In 2015 inward Dutch FDI stock amounted to 667 billion Euros or 88.3% of the Netherlands' GDP (DNB, 2016). Foreign investors provide 15% of Dutch employment in the private sector, with almost 1 million jobs. In all, more than 6,300 foreign companies have established over 8,110 operations in the Netherlands.



Stocks, in billions of US dollars. Source: UNCTAD, 2016.

Foreign Investors in the Netherlands

What companies say about the Netherlands

Strategic location

“Opening a base at Schiphol is an important strategic move for easyJet. easyJet is already the second largest airline at Amsterdam - one of Europe’s leading airports serving a large and growing aviation market with strong passenger demand both to and from the Dutch capital.”

easyJet (UK)

Digital Gateway

“Now, this is just the European Headquarters, but it is a matter of time before this office will serve as the headquarters for Africa and the Middle East as well.”

Netflix (USA)

Superior logistics and technology infrastructure

“Aside from the great infrastructure and the Netherlands excellent location in Europe, the Netherlands also appeals to us because of developments in the fields of smart cities, smart environments, and smart mobility.”

Huawei (China)



Source: Mediatheek Rijksoverheid

3. Human Capital and Innovation



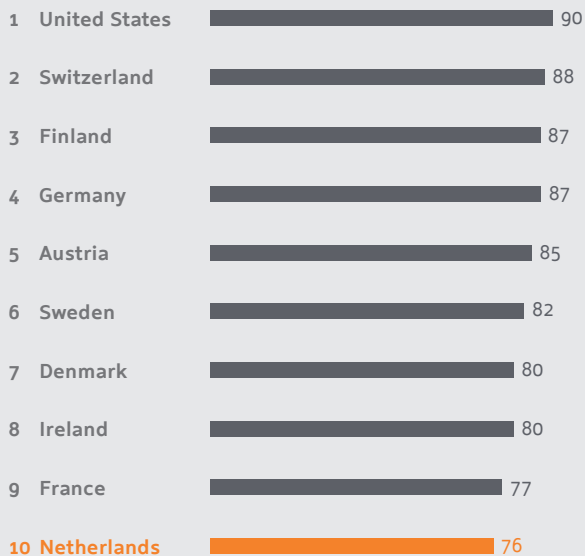
Innovation is rooted in the Dutch open mindset and is fostered by the country's strong educational system, including several world-renowned knowledge and research institutes. The Dutch apply for a large number of patents every year, many the result of the country's flourishing startup scene. Moreover, the Dutch are accustomed to pooling talent and resources through public-private partnerships.

Source: Mediatheek Rijksoverheid

Well-educated Working Population

The internationally-oriented working population of the Netherlands is well-educated, with many people being proficient in more than one foreign language. According to the EF English Proficiency Index 2016, the Netherlands ranks first out of 63 countries. In addition to English, many Dutch also speak German and French. The Dutch are also very computer literate. According to the OECD Skills Outlook, Dutch employees are above average proficient in literacy, numeracy and ICT. The Netherlands has world-class vocational training and life-long learning is commonplace.

Education level: upper secondary education (2016)

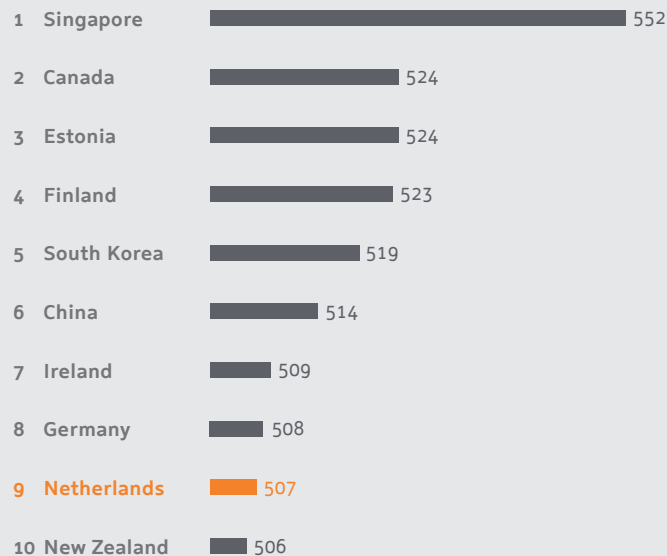


Measured as percentage of population (25-64 years old) that has attained upper secondary education.
Source: OECD, 2016.

Dutch Schoolchildren Score High in the EU

Dutch schoolchildren achieve good scores in the OECD Programme for International Student Assessment (PISA): eighth position within OECD, and sixth place in the EU. The PISA survey is conducted every three years among 500.000 school pupils across 72 countries, and evaluates the capacity of 15-year-old schoolchildren to understand and solve academic problems. According to the OECD this is a valid indicator for the economic potential of a country. PISA 2016 provides a detailed picture of how well schoolchildren all over the world are prepared for a knowledge-based society.

PISA Score



Measured as PISA scores (points). OECD average = 492
Source: OECD, 2016.

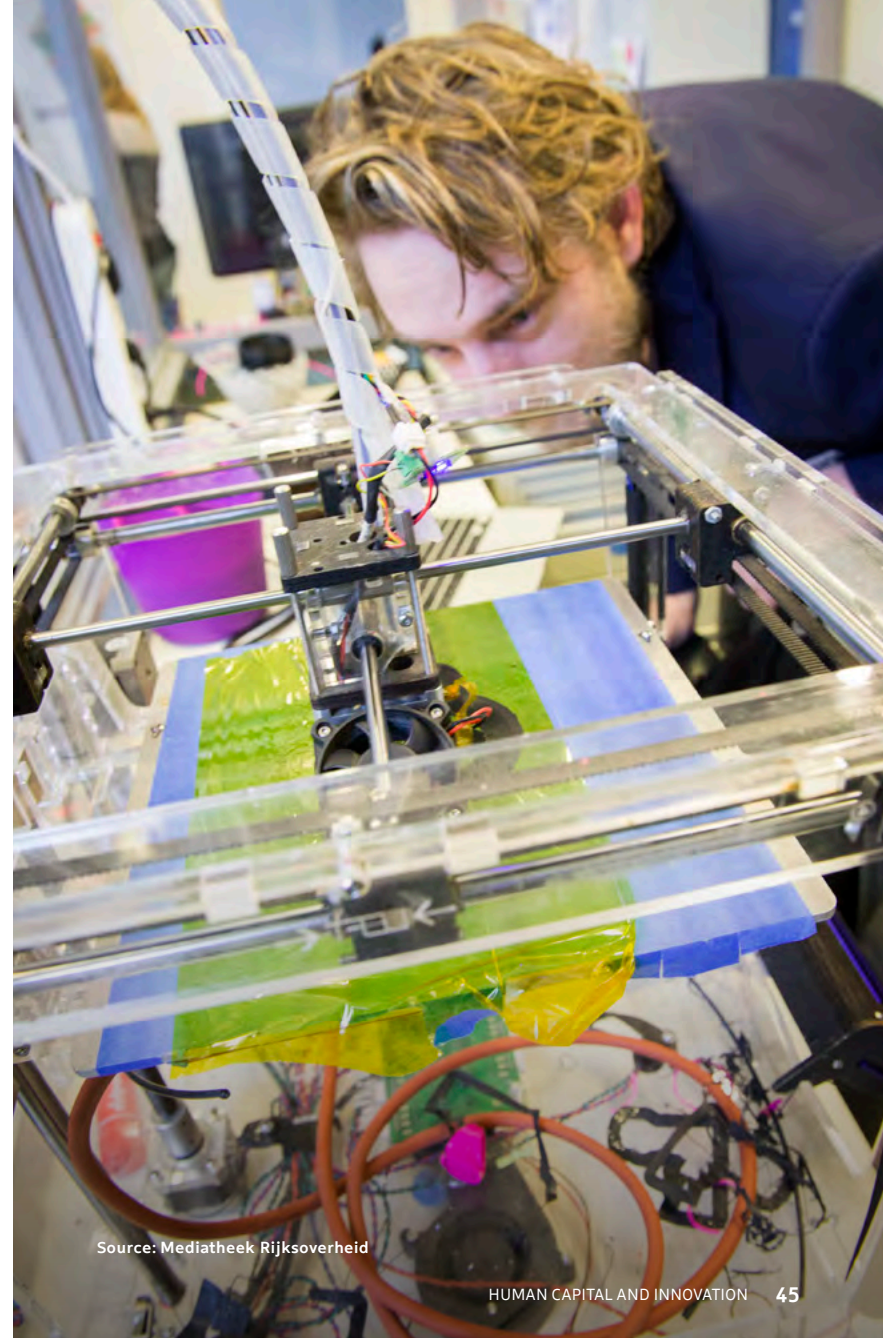
Global Innovators

The Netherlands is among the 10 most innovative countries in the world and one of the top five in Europe. The country scored well on the Global Innovation Index (GII) 2016, especially in terms of knowledge sharing, online creativity and creative goods and services.

Most innovative countries (2016)

1	Switzerland	66.28
2	Sweden	63.57
3	United Kingdom	61.93
4	United States	61.4
5	Finland	59.9
6	Singapore	59.16
7	Ireland	59.03
8	Denmark	58.45
9	Netherlands	58.29
10	Germany	57.94

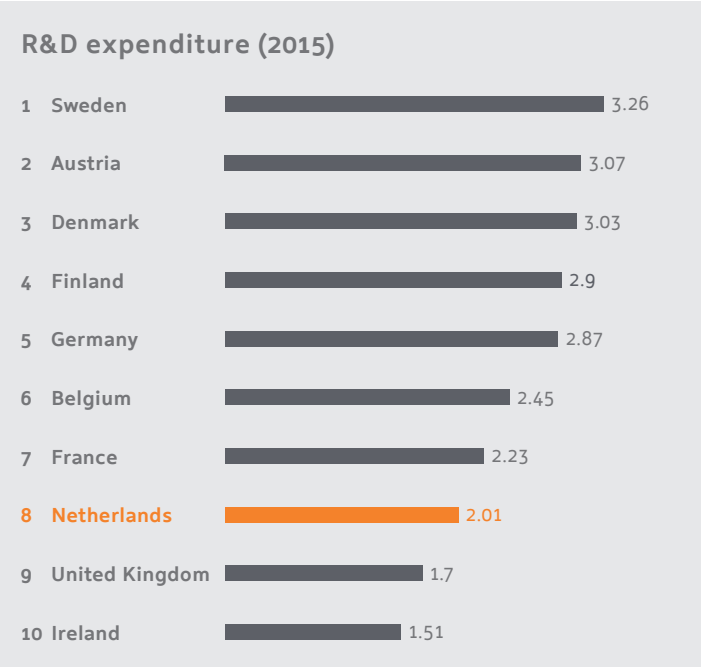
Source: INSEAD-WIPO, 2016.



Source: Mediatheek Rijksoverheid

Modest R&D Expenditure

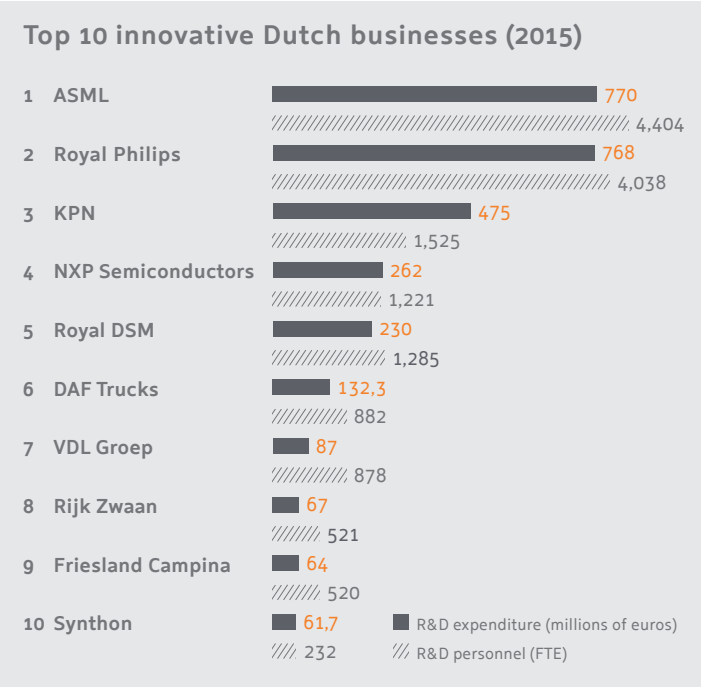
At 2.0% of GDP in 2014, Research & Development expenditure in the Netherlands is modest from an international perspective (EU-average was 2.0% in 2014). However, this can partly be explained by the Dutch sector structure because the services sector, which ‘naturally’ has a low R&D intensity, accounts for a relatively large share of the Dutch economy. Public-private partnerships in scientific research are a major factor, and the Netherlands is ranked sixth worldwide in this area, according to the Netherlands Observatory of Science and Technology (NOWT).



Source: Eurostat, 2017.

Home-grown Knowledge Multinationals

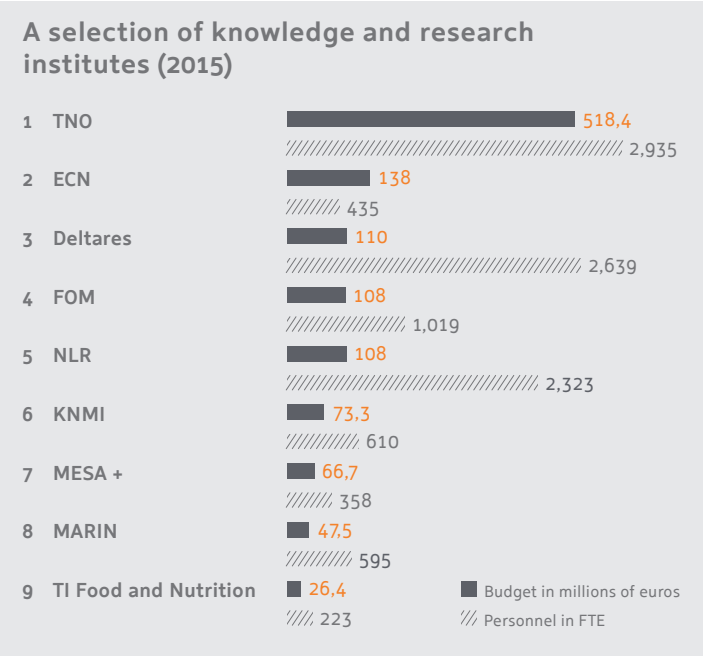
The Dutch economy has a broad and solid base. Leading multinationals with worldwide operations such as AkzoNobel, ASML, DAF Trucks, Heineken, NXP Semiconductors, Philips, Shell and Unilever have their roots in the Netherlands. Dutch industry includes a large number of innovative and knowledge-intensive companies that enjoy a sound reputation the world over and that carry out a great deal of R&D (including the aforementioned multinationals). In addition, there are also many other global businesses that conduct R&D activities in the Netherlands, such as Danone, Dow and Yakult.



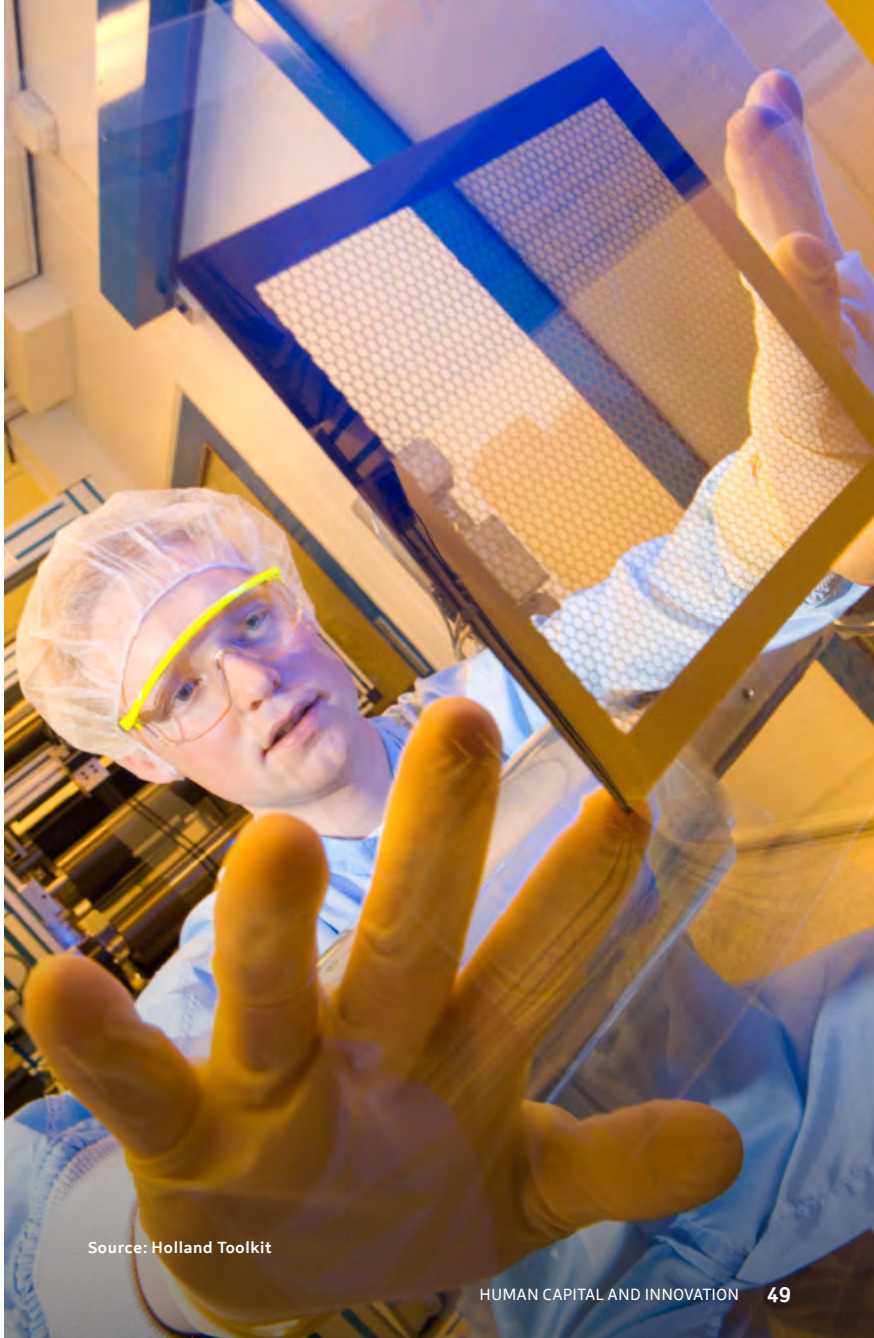
*Calculated by TW.
Source: Technisch Weekblad, 2015.

Large Knowledge and Research Base

Dutch universities score relatively highly for teaching and research in a number of international rankings (see: www.vsn.nl/Focus-areas/Key-objectives/Top-research/TopresearchNew.htm en Dutch Scientists frequently cited). Wageningen University (WUR), for example, is a global leader in green biotechnology, and Leiden University leads the way in the biomedical life sciences. In addition, the Netherlands is home to a significant number of renowned knowledge and research institutes such as ECN and TNO, which play an important role in the government-initiated public-private innovation programmes.



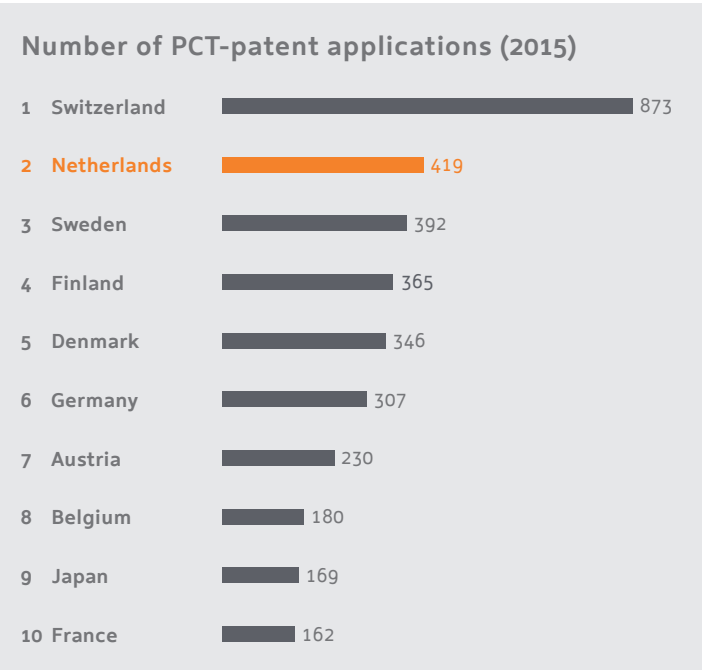
Source: Technisch Weekblad, 2016.



Source: Holland Toolkit

Patent Powerhouse

PCT (Patent Cooperation Treaty) patents are patent applications that are registered with the World Intellectual Property Organisation (WIPO). The Netherlands has the second highest (first in the EU) number of patent applications per million inhabitants in the world. Patents are in many cases the result of R&D activities which, if successful, can lead to greater labour productivity and an advantage over foreign competitors. This high score means that Dutch industry is an attractive potential partner - one that is innovative, inviting and dynamic.



*Number of patent applications per million inhabitants.
Source: European Intellectual Property Organisation, 2016.



Source: Mediatheek Rijksoverheid

4. Logistical and Digital Infrastructure

The Netherlands has excellent infrastructure, both logistical and digital, making it an attractive business location as well as a key contributor to global trade flows. In fact, 25% of foreign investors are ICT related. Furthermore, the Netherlands' comprehensive multi-modal logistical infrastructure is an integral part of European and global distribution of products and services.

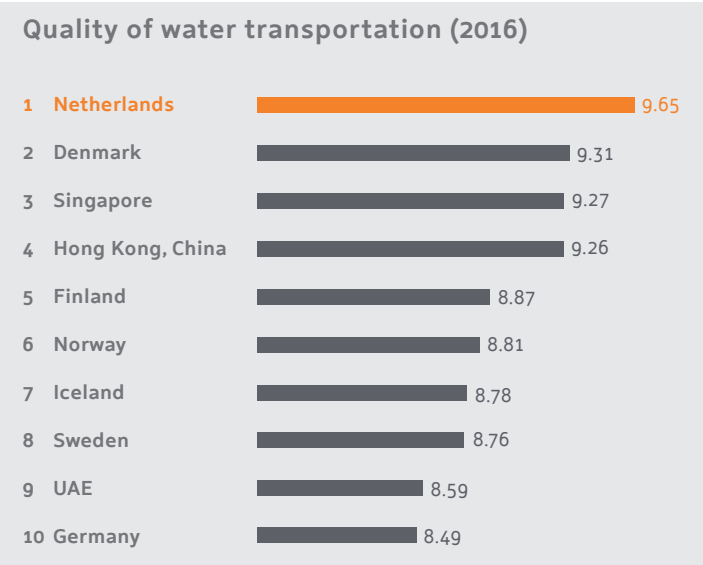
Source: Mediatheek Rijksoverheid

Navigable Inland Waterways

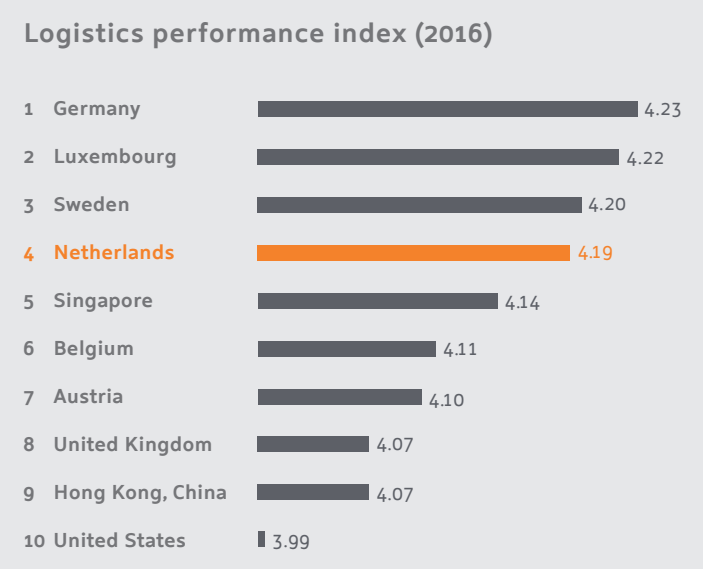
The Netherlands has a good physical infrastructure, with the world-class (main)ports and the navigable inland waterway system being prime examples. The extensive network of inland waterways has excellent connections to the waterways in the rest of Europe. The Netherlands has the best water transport infrastructure in the world. The country also has an extensive road transport network and is second in the world as regards road network density (IMD, 2015). According to IMD (2016), the Dutch energy infrastructure also scores well, taking the seventh place overall.

Strong Logistics Performance

The Netherlands’ strong position in terms of logistics is due to the favourable geographic location of the country in the heart of Europe, a sound infrastructure that includes the Port of Rotterdam, the Port of Amsterdam, Amsterdam Airport Schiphol and a sophisticated logistics sector. This is reflected in the World Bank Logistics Performance Index 2016, where the Netherlands is ranked fourth. The Netherlands came out on top in terms of the efficiency and effectiveness of its Customs and other border procedures, the quality of its transport and IT infrastructure for logistics, the ease of use and affordability of its shipping, and the level of professionalism in the Dutch logistics industry.



Harbours, canals, etc.
Source: IMD, 2016.

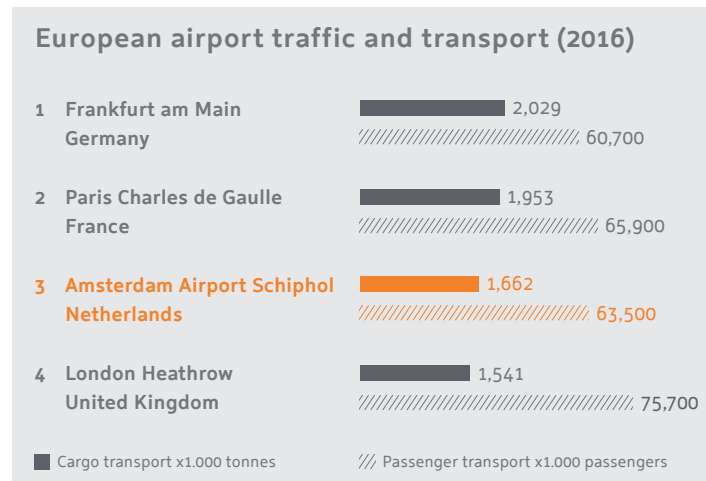


Source: World Bank, 2016.

Third-largest Airport in Europe

In 2016 Amsterdam Airport Schiphol was Europe's 3rd largest airport in terms of passenger numbers and third in cargo volumes. A total of 103 airlines offer direct flights from Schiphol to 322 destinations. This makes Amsterdam Airport Schiphol one of the five most important Main Ports (or hubs) in Europe.

It is also one of the two European home bases of Air France-KLM and the SkyTeam alliance. In addition, Schiphol is an important contributor to the regional economy, providing direct employment for around 65,000 people at the airport. The contribution to the national economy amounts to about 26 billion euros, and a total of 290,000 jobs nationwide. Schiphol is also renowned for its inspiring facilities for passengers and innovative technical solutions such as the extensive baggage handling system.



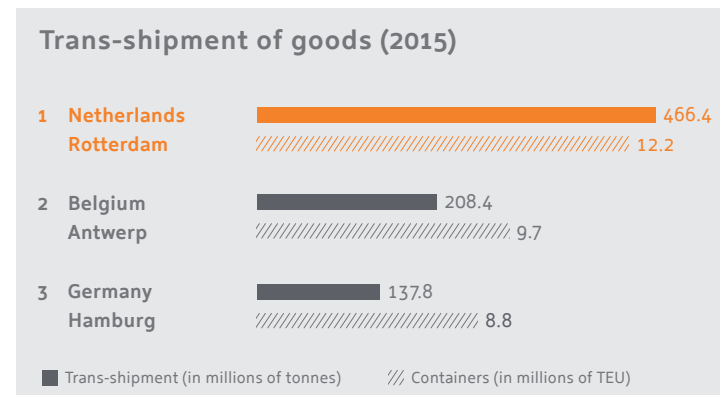
Source: Schiphol Group, 2017.

Largest Port in Europe

In terms of total weight of goods trans-shipment, Rotterdam is the largest port in Europe. The trans-shipment in Rotterdam added up to 466.2 million tons in 2016. The number of containers handled amounted 12.4 million TEUs in 2016.

Businesses often choose to locate in-and-around the Port of Rotterdam because of its strategic location in north-west Europe, depth of its harbours, the many port facilities, and its excellent transport links with the hinterland.

Many companies from America and Asia use Rotterdam as a base for the European distribution of their goods. Many large European distribution centres are located close to the container terminals, and these ensure that products can be dispatched efficiently to anywhere on the continent or to overseas destinations. The combined activities of the port account for about 5% of Dutch GDP.



Source: Port of Rotterdam, 2016.

Strong in Connectivity and Cyber Security

The Dutch and ICT

- The Netherlands has the second highest online connectivity in the world: 96% of households are connected to (broadband) internet compared to the European average of 78%.
- Nearly 100% of Dutch businesses use internet to do their work, 98% with a broadband connection, according to 2016 statistics.
- 91% of Dutch aged 16-74 are active internet users, compared to 75% of Europeans in the same age group. 75% of Dutch aged 16-74 have basic ICT skills, compared to the European average of 59%.
- 97% of all mobile phones of Dutch aged 20-29 is a smartphone; 86% of the total mobile phones.
- Big data, cyber security, and open access are priority issues for the Dutch government which has committed 40 billion euros for the programme 'Commit2Data'



Source: Mediatheek Rijksoverheid

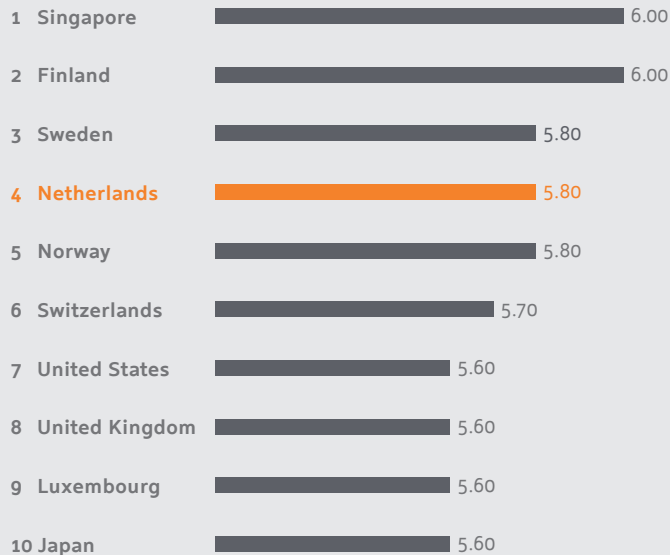
Advanced ICT Economy

Research by the World Economic Forum in 2015 (Global IT Report 2015) gave the Netherlands a 4th place score out of 145 countries. The WEG Networked Readiness Index (NRI) is one of the most comprehensive and authoritative assessments of the impact of ICT on competitiveness of nations and the well-being of their citizens.

Leading the Field in Broadband

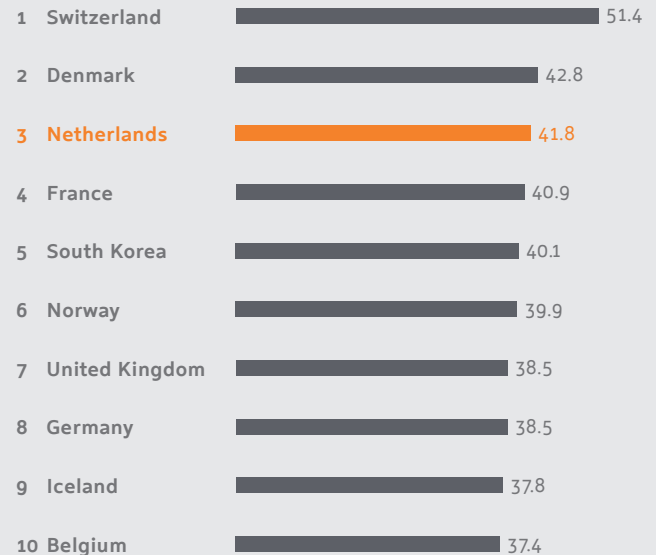
In June 2016, the Netherlands had the third-highest number of broadband connections per 100 inhabitants in the world. Almost every household is served by a cable or DSL connection. The Netherlands is also home to the world's second-largest digital data distributor, the Amsterdam Internet Exchange (AMS-IX), providing businesses with an outstanding data connection network.

Most advanced ICT economies (2015)



Source: World Economic Forum, 2015.

Number of broadband connections (2016)



Measured per 100 inhabitants.

Source: OECD, 2017.

5. Government

The background image is a photograph of the Binnenhof complex in The Hague, Netherlands. It features several large, historic brick buildings with dark, gabled roofs and numerous windows. A person is riding a bicycle across a bridge in the foreground, slightly out of focus. The sky is overcast and grey.

The complex of buildings known as the 'Binnenhof' (Inner Court) in The Hague is the seat of the Dutch parliament. The Dutch government enjoys a good international reputation and functions effectively. The Netherlands is one of the most stable nations in the world with a competitive and healthy fiscal climate.

Source: Hollandse Hoogte

Effective Government

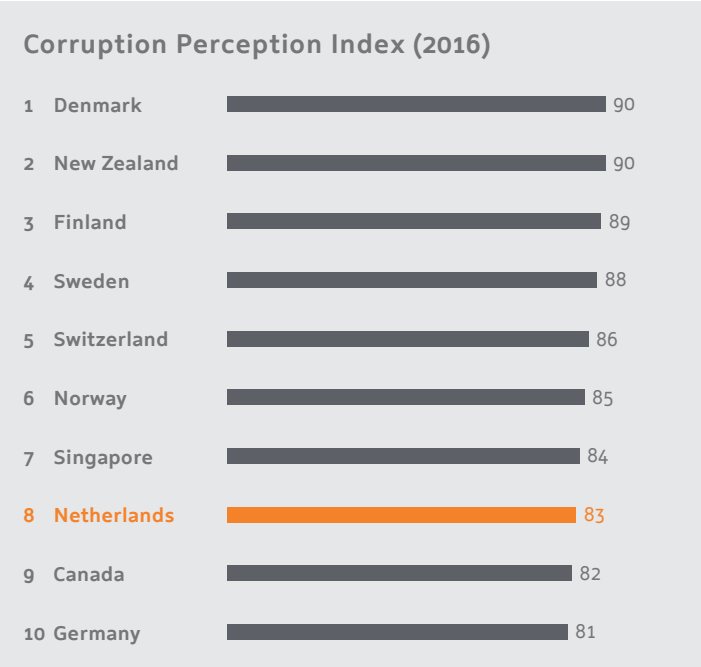
According to the World Bank, the government of the Netherlands is one of the most effective in the world, thus making it easier for companies to make medium and long-term decisions. The figures for government effectiveness capture the perceptions of the quality of public services; the quality of the civil service and the degree of its independence from political pressures; the quality of policy formulation and implementation; and the credibility of the government's commitment to such policies.



Source: World Bank, 2016.

One of the Least Corrupt Countries

According to the Transparency International Corruption Perception Index, levels of corruption and nepotism in the Netherlands are among the lowest anywhere in the world. Among the aspects of corruption that were examined were the degree to which people in authority - such as customs officers, police officers, politicians, judges and other officials - misuse their position for personal gain (financial or otherwise). IMD (2016) also concludes that bribery and corruption are rare in the Netherlands: the country ranks fifth worldwide.



Source: Transparency International, 2017.

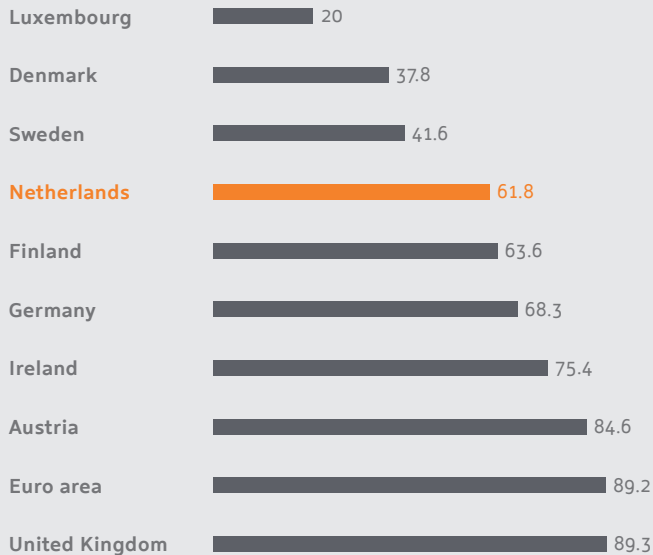
Moderate Level of Government Debt

According to the CPB - Netherlands Bureau for Economic Policy Analysis - the budget surplus will increase from 0.3% of GDP in 2016 to 0.5% in 2017 and 0.8% in 2018. The government debt will be reduced from 58.5% of GDP in 2017 to 55.5% in 2018, which is lower than the EMU standard of 60% (CPB-forecast, Spring 2017).

Competitive Taxation Climate

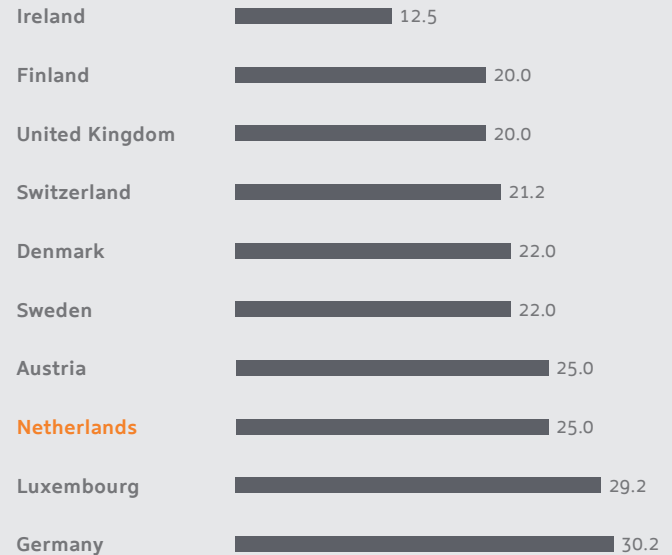
The Netherlands offers a supportive fiscal climate for international companies: a moderate statutory corporate income tax rate of 25% (20% over first 200.000 Euros), a participation exemption, a wide tax treaty network, special measures for highly-skilled expats and certainty in advance of future tax positions - just a few of the features that help multinational companies to thrive in the Netherlands.

National gross debt as a percentage of GDP (2016)



Source: Eurostat, 2017 (selected countries).

Corporate tax rate on profit 2016 (%)



Source: IMD, 2016 (selected countries).

6. Top Sectors in Focus

An aerial photograph of a busy flower market street, likely in the Netherlands. Several workers wearing high-visibility vests are operating red and orange pallet trucks. The trucks are loaded with large metal cages filled with crates of various flowers, including white and red roses. The street is marked with yellow dashed lines, and the overall scene depicts a highly organized and active commercial environment.

In its economic policy, the Dutch government is focussing on nine business sectors that are key to the Netherlands' international trade and investment. These are sectors that are leading the way in innovation and sustainability, collaborating with Dutch knowledge institutes on world-class research and development. Together, these sectors are the drivers of the Dutch economy.

Source: Mediatheek Rijksoverheid

World-leading Supplier of Agri-Food Products

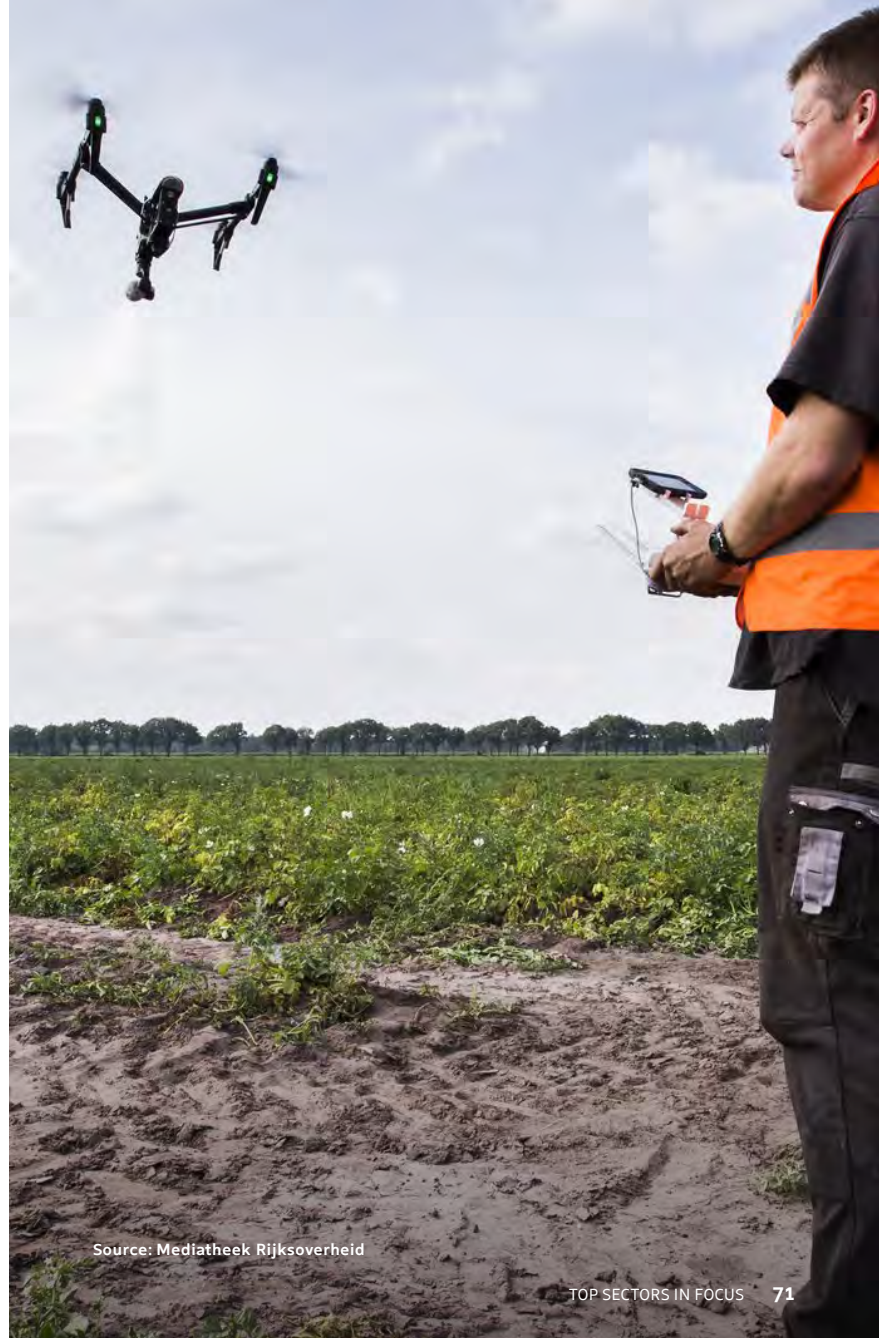
Agriculture & Food Sector

Did you know?

- The Netherlands is the world's 2nd largest exporter of vegetables and 2nd largest exporter of fruit?
- The total value of Dutch agricultural exports was 85 billion euros in 2016?
- Holland is a dairy nation - the Dutch love their milk, cheese and yoghurt and also export a lot of it. Dairy makes up for 8% of Holland's trade surplus.
- The Dutch love their potatoes, too. In 2015, Holland was 1st in the world in the export of seed potatoes and 4th in fresh or chilled potatoes?
- Germany is the largest consumer of Dutch agricultural products.
- Three of the world's top 25 food and beverage companies are situated in the Netherlands?
- Wageningen University and Research Center is one of the most authoritative agri-food and nutrition research centres in Europe?
- Holland is a leading innovator for rooftop farms and floating farms.

Learn more:

www.dutchfoodinnovations.com



Source: Mediatheek Rijksoverheid

In Transition to Greener Materials

Chemical Sector

Did you know?

- Holland was the world's sixth largest supplier of chemical products and services in 2016, with exports valued at 7.8 billion euros.
- Holland is home to world-class R&D institutes for fundamental and applied research such as TNO, NOW, ECN and the universities of Delft, Eindhoven, Twente and Wageningen.
- Holland hosts 16 of the world's top 25 leading chemical companies, including BASF, AkzoNobel, DSM, and Shell.
- The Dutch chemical sector can thank its success on its integrated approach of public-private partnerships and open innovation.
- In the field of advanced materials (polymers, composites, etc.) the Dutch consistently punch above their weight, producing innovations such as Twaron, Dyneema and Glare.
- The Dutch chemical sector is transitioning to using and producing more greener, sustainable products.

Learn more:

www.vnci.nl/english



Source: Mediatheek Rijksoverheid

Masters in Architecture, Design, Fashion, Gaming and Music

Creative Industries

Did you know?

- The Dutch creative industries rank among the world's top 10 for trade, jobs and brands.
- Dutch creativity is also contributing to a more sustainable society with e.g. solar cars, self-healing concrete, and recyclable phones.
- Dutch architects that are in demand worldwide include Rem Koolhaas (OMA), Francine Houben (Mecanoo), Ben van Berkel and Caroline Box (UNStudio).
- Dutch fashion designers with international acclaim include Jan Taminiau, Iris van Herpen, Spijkers and Spijkers, Sjaak Hullekes and Studio Jux. World-famous Dutch brands include G-Star, Sandwich, Gsus and Supertrash.
- The Dutch gaming industry is especially strong in serious gaming and simulation.
- Five Dutch DJ's are in the world's top 10 including Tiesto, Martin Garrix, Armin van Buuren, Hardwell and Afrojack.
- Dutch industrial designers include Marcel Wanders, Hella Jongerius and Daan Roosegaarde.

Learn more:

www.creativeholland.com/en



Avis De Miranda / Shutterstock.com

Innovative, Sustainable Energy Solutions

Energy Sector

Did you know?

- The Netherlands wants to be 100% circular in 2050.
- The Dutch government wants to see a mix of energy from renewables (like wind and solar) and traditional sources, such as oil, gas and coal.
- A thousand new wind turbines are being built in the Netherlands. By 2020, 14% of all energy will be generated from renewable sources, rising to 16% by 2023.
- All new greenhouses in the Netherlands will be climate-neutral from 2020 onwards.
- The Netherlands is leading the way with Waste-to-Energy initiatives. It even imports municipal waste from other countries to convert to power, heat and reusable resources.
- Electric mobility is taking off in the Netherlands, including the fast growing number of charge stations throughout the country.
- Solar power innovation is strong in the Netherlands. For example, the Delft University of Technology has won the World Solar Challenge eight times.
- The Port of Rotterdam is one of the world's three largest fuel hubs.

Learn more:

www.cleantechholland.com



Source: Mediatheek Rijksoverheid

New Technologies for Health, Mobility, Energy and Security

High Tech Sector

Did you know?

- Dutch companies invented WiFi, the CD, the DVD and Blu-ray discs. Bluetooth was invented by Dutchman Jaap Haartsen.
- High tech equipment from Dutch companies is used in 90% of all silicon chips produced worldwide.
- Holland's high tech sector is a world leader in the development of new technologies and materials for use in communication systems, aircraft and automobiles, medical devices, energy generation and semi-conductor production.
- Holland is a hotbed of photonics expertise, particularly in the Eindhoven Brainport region.
- The Dutch are also on the forefront of the digital manufacturing revolution, from 3D printers to the Internet of Things, cloud computing and big data to smart robots.
- The Dutch universities of technology at Delft, Eindhoven, and Twente are world-renowned for their research.
- The Dutch triple helix approach between government, business and research institutes is a proven model for successful high tech innovation.

Learn more:

www.hollandhightech.nl



Source: Nuon Solar Team/Delft University of Technology

World's Leading Supplier of Flower, Plants and Trees

Horticulture Sector

Did you know?

- Holland has an almost 50% share of the global trade in floricultural products.
- Some 77% of all flower bulbs traded worldwide come from the Netherlands, the majority of which are tulips.
- The sector is the number one exporter to the world for live trees, plants, bulbs, roots and cut flowers.
- 75% of Dutch horticultural products are exported. The market continues to grow 1-2% yearly.
- No wonder Holland is also known as the flower garden to the world
- Greenhouses are synonymous with Holland. These days, the Dutch are leading the world in greenhouse innovation, including intelligent, energy-neutral, LED-lit greenhouses that float or are situated on office rooftops.
- In the Dutch vision 'Greenports 2040' the sector predicts that 50% of Holland's horticultural companies will have one or more international offices.

Learn more:

www.greenportholland.com



Helping to Advance Health Worldwide

Life Sciences and Health Sector

Did you know?

- The Netherlands is world-renowned for its healthcare system
- Dutch expertise in healthcare infrastructure is on demand due its turn-key approach. Dutch companies can cover all aspects including hospital design and engineering, financing, waste management, medical equipment and energy efficiency.
- The Dutch are specialized in the development of 'healing environments'.
- The Netherlands ranks 2nd worldwide in patent applications for biotechnology, according to OECD figures
- Philips is the world leader in medical imaging and patient monitoring technology.
- The Dutch public-private partnership model, such as the Netherlands Genomics Initiative (NGI) and the three top institutes (TI Pharma, CTMM and BMM) have set an international standard.
- The Centre of Expertise Healthy Ageing is a sustainable public-private partnership of some 150 organizations in education, research, care & wellbeing and business. Professionals, researchers and students are working together in 25 innovation labs, which are testing grounds for innovative solutions in healthcare.

Learn more:
www.health-holland.com



Source: Mediatheek Rijksoverheid

Strategic Gateway to Europe and Beyond

Logistics Sector

Did you know?

- The quality of Dutch infrastructure is among the best in the world, with excellent facilities for maritime (1), road (2), air (4), and rail (7) transport, according to the World Economic Forum.
- In 2016, the Netherlands ranked 4th in the World Logistics Performance Index. The sector aims to be number 1 on this index in 2020.
- The presence of three closely-coordinated main ports (Schiphol airport, the Port of Rotterdam and the Amsterdam Cocoa Port) makes the Netherlands a unique gateway to Europe.
- The Port of Rotterdam is 8th in the world in transshipment volume for overseas transport.
- Dutch inland shipping accounts for 54% of all trade shipping in Western Europe. Some 80% of all containers transported via inland shipping in the EU, passes through the Netherlands.
- The Netherlands is a living lab for the development of sustainable logistics solutions, e.g. electric delivery trucks and boats in city centres and truck platooning on its highways.

Learn more:

www.HollandLogisticsLibrary.com



World Leaders in Hydraulic Engineering, Water Treatment and Shipbuilding

Water Sector

Did you know?

- When it comes to flood protection, the Dutch are world leaders.
- 40% of water-related projects around the world (on the open market) are being carried out by the Dutch.
- Besides keeping water out, the Dutch also know how to make and keep water clean. Built on four centuries of hard-earned experience, the Dutch are unrivaled in areas such as drinking water production, water distribution, sewage management, and wastewater treatment.
- The Dutch actively recycle industrial waste water - this recycled water is of such high quality that it can be used in the food and beverage industries.
- The Dutch 'Room for the River' project, one of the biggest mitigation projects in the country, served as inspiration for communities along the Mississippi River and in the state of California.
- The Dutch maritime industry is strong in shipbuilding and yacht-building. More than 60% of the seagoing ships built in Holland are destined for export.

Learn more:

www.dutchwatersector.com



Source: Holland Toolkit

Amazing Solutions to Global Challenges

Innovators 2017

These Dutch innovators, often working in public-private partnerships, are making a world of difference with sustainable solutions that contribute to the United Nations Sustainable Development Goals.

Global Challenge	Innovators	Sustainable Solutions
Food & Health	www.growx.co	First commercial Dutch vertical farm
Food & Health	www.vivi.nu/viviverte/	Growing lettuce in a bag, pesticide-free
Food & Health	www.seamorefood.com	Making pasta and bacon from seaweed
Food & Health	www.omnigen.nl/en/	Using DNA to test medicine
Food & Health	www.somnox.nl	Soft-robotic companion that helps you sleep
Food & Health	www.micreos.com	Endolysin technology to replace anti-biotics
Food & Health	www.xilloc.com	3D printed personalized implants
Food & Health	robert.breton1@gmail.com	PANACEAR: In-vivo diagnostics & treatment
Food & Health	www.koppertcress.com	Pioneer in culinary plants
Food & Health	www.zeewaar.nl	First sustainable seaweed farm
Transport	www.delfthyperloop.nl	Hyperloop train test track
Transport	www.rijkswaterstaat.nl/english	Truck platooning
Transport	www.teamfast.nl	Formic acid and CO2 as power for buses
Transport	www.emoss.biz	Fully electric Dutch truck
Transport	www.schiphol.nl/en/schiphol-group	Sustainable airport of the future
Energy	www.tennet.eu	North Sea island power hub
Energy	www.redstack.nl/en	Energy from osmosis
Energy	www.tudelft.nl/radiationscience	Thorium Molten Salt Reactor
Energy	www.soundenergyplc.com	Thermo Acoustic Energy Converter: using sound waves to cool and heat buildings

Innovators 2017 – continued

Global Challenge	Innovators	Sustainable Solutions
Energy	www.ampyxpower.com	Affordable clean energy through flying windturbine
Energy	www.tocardo.com	Tidal, river and ocean energy turbines
Environment & Raw Materials	www.carbonoro.com	Carbon capturing using amine technology
Environment & Raw Materials	www.aquaunique.nl	Reefguard: Coral Laboratory
Environment & Raw Materials	www.groasis.com/en	Growboxx: Letting new trees survive in dry areas, using 90% less water
Environment & Raw Materials	www.dutchawareness.com	Recycling textile into new composites
Environment & Raw Materials	www.inkless.ink	Inkless printing - burning documents on paper
Environment & Raw Materials	www.ioniqa.com	Cradle-to-cradle solution for PET polyester
Environment & Raw Materials	www.plantics.nl	Bio-polymers from organic sources
Environment & Raw Materials	www.ecochain.com	Ranking sustainable suppliers
Environment & Raw Materials	www.biomimicrynl.org	Design copied from nature
Environment & Raw Materials	www.briniclegroup.com	BerkiCold: effective, safe fire extinguishing foam
Innovative Society & Security	www.lighting.philips.com	LED lighting mass adoption and shifting business models
Innovative Society & Security	www.zomerondernemer.nl	Summer vacation programme that introduces children to entrepreneurship
Innovative Society & Security	www.invi.world	Invi (former PearlTect) anti-rape bracelet
Water	www.elementalwatermakers.com	Sustainable reverse osmosis to produce fresh water
Water	www.buildingwithseawater.com	The Salt Project: Using the sea and the sun to produce fresh water and build salt houses
Water	www.aquaterranova.eu	Triton: Biological water purification
Water	www.nijhuisindustries.com	GENIUS system filters excrement and turns it into phosphate, nitrogen, potassium and clean water
Water	www.sunglacier.nl	Producing fresh water from water vapor in tropical temperatures

Source: 'Ideas From Europe', Netherlands Ministry of Economic Affairs

Sources

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schiphol.nl/en/schiphol-group

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vnci.nl/english

Association of Universities in the Netherlands
vsnu.nl/en_GB

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boip.int

Chambers of Commerce
kvk.nl/english

The Conference board
conference-board.org

Dutch Export Platform for Dutch clean tech Companies
cleantechholland.com

Dutch Federation of Agriculture and Horticulture (LTO)
lto.nl/english

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imd.org

IMF
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INSEAD
globalinnovationindex.org

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Ministry of Social Affairs and Employment
government.nl/ministries/ministry-of-social-affairs-and-employment

Netherlands Bureau for Economic Policy Analysis
cpb.nl/en

Netherlands Enterprise Agency, focus on sustainability, innovation and international
english.rvo.nl
hollandtradeandinvest.com

Netherlands Foreign Investment Agency
investinholland.com

the Netherlands Observatory of Science and Technology
nowt.merit.unu.edu/index.php?lang=GB

Netherlands Organization for International Cooperation in Higher Education
nuffic.nl/en

the Netherlands Organisation for Applied Scientific Research
tno.nl/en

Netherlands Patent Office
english.rvo.nl/topics/innovation/patents-other-ip-rights

OECD
oecd.org

Plantum (Dutch Association for Plant Propagation Material)
plantum.nl/321519619/Basis-for-the-Green-Economy

Port of Rotterdam Authority
portofrotterdam.com/en

Social and Cultural Planning Office of the Netherlands
scp.nl/english

Statistics Netherlands
cbs.nl/en-gb

Technisch Weekblad
technischweekblad.nl

Transparency International
transparency.org

UNCTAD
unctad.org

United Nations
comtrade.un.org

United Nations Development Programme
hdr.undp.org

World Bank
worldbank.org

World Economic Forum
weforum.org

World Trade Organization
wto.org

Colophon

Published by the Netherlands Enterprise Agency
on behalf of the Netherlands Ministry of Foreign Affairs.

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Cover Photo

Hollandse Hoogte

Explanatory Notes

This publication is intended to provide a concise and representative picture of the state of the Dutch economy. Every attempt has been made to carefully and judiciously select indicators from internationally renowned and reliable sources which compare the Netherlands with countries that are similar in terms of their economic structures.



Ministry of Foreign Affairs

