



Overall performance

The Netherlands' infrastructure procurement processes rank second among InfraCompass2020 countries. Combined with strong regulatory frameworks and infrastructure governance systems this helps encourage infrastructure investment and competition among suppliers. Additionally, with a strong credit rating and high GDP per capita, the Netherlands has a strong infrastructure funding capacity. However, sluggish long-term GDP growth, relatively high public debt and the potential economic fallout from the COVID-19 pandemic may adversely affect Netherlands' ability to fund infrastructure investment in the future.

Drivers	Rank (/16)	Rank change (2017-20)	Score (/100)	Emerging	Aspiring	Contender	Top performer	Global leader
Governance	3	↑ 1	82	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Regulatory frameworks	4	↓ 1	80	Green	Green	Green	Green	Light Blue
Permits	5	—	91	Blue	Blue	Blue	Blue	Blue
Planning	10	↓ 1	97	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Procurement	2	↓ 1	94	Light Green	Light Green	Light Green	Light Green	Light Green
Activity	56	↓ 17	25	Teal	Teal	Light Blue	Light Blue	Light Blue
Funding capacity	7	—	80	Orange	Orange	Orange	Orange	Light Blue
Financial markets	14	—	63	Yellow	Yellow	Yellow	Yellow	Light Blue

Netherlands at a glance

\$52,368
GDP per capita
(USD, 2019)

17.2 million
Population
(2019)

—
Infrastructure investment
(2019 estimate)

—
Infrastructure gap
(2019 estimate)

94.3
Infrastructure quality
(0-100, 100 is best, 2019)

\$2,194 million
Private infrastructure investment
(5-year average, USD, 2019)

Top performing metrics



100/100

Transparency in public procurement

The Netherlands' public procurement notices are made available online and tender documents transparently detail procurement procedures. The transparency of the process encourages more participation and competition, which can drive value for money.



100/100

Summary credit rating

The Netherlands' institutional strength and high per capita income have helped it maintain a AAA credit rating from the major ratings agencies. The Netherlands' credit rating and sound macro-financial management allow the government to borrow at a lower cost to fund investment in infrastructure.



97.8/100

Registering property

In the Netherlands it takes just 2.5 days to register a property, a fraction of the 25 day European average. As infrastructure projects often involve some transfer of property rights, an efficient registration process reduces project cost and risk.

Opportunities to grow



8.7/100

Long term GDP growth trend

The Netherlands' long-term GDP growth trend decreased to 0.9%, below the High Income Countries' average of 1.9%. Combined with the uncertain impact of the COVID-19 pandemic, low growth may hamper the Netherlands' ability to borrow and build more infrastructure.



61.4/100

Gross government debt

The Netherlands' gross government debt sits at 49% of GDP, lower than the High Income Countries' average of 74% of GDP. However, the impacts of the COVID-19 pandemic may expand government debt further, and hinder Netherlands' ability to invest in infrastructure.



49/100

Dealing with construction permits

According to the World Bank, in the Netherlands it takes an average of 161 days to deal with construction permits. Expediting this process could significantly impact investment in infrastructure by helping to reduce delays.

For guidance on how to improve these metrics, please see the [Netherlands Country Page](#) on the InfraCompass website.



ECONOMY OVERVIEW

GDP (\$US billion, 2019)	902.4	Population (million, 2019)	17.2	Unemployment rate (2019)	3.8%
GDP per capita (\$US, 2019)	52,368	Urbanisation ratio (2018)	91.0%	Inflation rate (2019)	2.5%
GDP growth rate (annual, 2019)	1.8%	Gross Government Debt (% of GDP, 2019)	49.0%	Digital Adoption Index (0-1 best, 2016)	0.84
GDP per capita growth rate (annual, 2019)	-1.6%	Sovereign risk rating (2019)	100	Gini coefficient (0-100 worst, 2015)	28.2

METRIC SCORES

The below metrics are normalised so that they all range from 0 to 100. For original metrics and data sources, please see <https://infracompass.github.org/>

GOVERNANCE		REGULATORY FRAMEWORKS		PERMITS	
Post-completion reviews?	Yes -	Effect of taxation on incentives to invest	67.8 ↑	Cost to start a business	92 ↑
Infrastructure or PPP unit/agency?	Yes -	Prevalence of foreign ownership	71.6 ↓	Dealing with construction permits	49 -
Recovery rate	90.1 ↑	Product market regulation, network sectors	74.2 -	Quality of land administration	95 -
Rule of law	86.3 ↓	Regulatory (including competition) quality	90.4 ↑	Registering property	97.8 -
Shareholder governance	50 -	Strength of insolvency framework	71.9 -	Time required to start a business	92.3 -
Political stability and absence of violence	64.5 ↓	Investment promotion agency?	Yes -		

PLANNING		PROCUREMENT		ACTIVITY	
Published project pipeline?	Yes -	Average procurement duration – transaction RFP	73.4 -	Infrastructure investment	40 [^] ↑
Published infrastructure plan?	Yes -	Degree of transparency in public procurement	100 -	Private infrastructure investment	19.3 ↓
Preparation of PPPs	81 ↓	Published procurement guidelines?	Yes -	Value of closed PPP infrastructure deals	23.7 ↑
Economic analysis assessment?	Yes -	Procurement of PPPs	80 -	Value of closed infrastructure deals with foreign equity sponsorship	15.2 ↓
Market sounding and/or assessment?	Yes -	PPP contract management	75 -		
Environmental impact analysis?	Yes -				

FUNDING CAPACITY		FINANCIAL MARKETS	
GDP per capita	66.8 ↑	Domestic credit to private sector	50.9 ↓
Gross government debt	61.4 ↑	Financing through local equity market	69.6 ↑
Long term GDP growth trend	8.7 ↓	Stocks traded	48.5 [^] -
Summary credit rating	100 -	Financial depth	76.3 ↑
		Financial stability	93.1 ↑

Drawing on data from: International Monetary Fund, Organisation for Economic Co-operation and Development, World Bank, World Economic Forum, IJ Global, CEPII, Oxford Economics, Trading Economics, and Deloitte.

Metric key:

↑ Increase from InfraCompass 2017 ↓ Decrease from InfraCompass 2017 - No change from InfraCompass 2017

Note:

'Top performing metrics' are the metrics with the highest score out of 100.

'Opportunities to grow' are the metrics with the lowest weighted score out of 100. These metrics would have the greatest impact on the overall score.

[^]Denotes interpolated metric data. See Technical Appendix for further explanation on the interpolation techniques.