



Overall performance

The European countries in InfraCompass have averaged total infrastructure investment of 2.9% of GDP per annum and attracted USD 26 billion in private infrastructure investment over the past five years. Europe is characterised by some of the best procurement practices and regulatory frameworks in InfraCompass. Europe has also seen a large increase in funding capacity, as its economies recovered following the GFC; however this is now expected to be diminished by the COVID-19 pandemic. Its continued low long-term GDP growth and mostly already established infrastructure means that investment activity is low. To improve, more long-term planning of infrastructure that sets out cross-sectoral strategy and actions is needed.

Drivers	Score(/100)	Score change (2017-20)	Emerging	Aspiring	Contender	Top performer	Global leader
Governance	70	—	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Regulatory frameworks	71	↑ 1	Green	Green	Green	Green	Green
Permits	78	—	Blue	Blue	Blue	Blue	Blue
Planning	71	↑ 4	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Procurement	82	↑ 5	Light Green	Light Green	Light Green	Light Green	Light Green
Activity	25	↓ 4	Teal	Teal	Grey	Grey	Grey
Funding capacity	60	↑ 4	Orange	Orange	Orange	Grey	Grey
Financial markets	46	↑ 1	Yellow	Yellow	Yellow	Grey	Grey

Europe at a glance



\$35,378

GDP per capita
(regional average, USD, 2019)



633.6 million

Population
(regional total, 2019)



2.9% of GDP
Infrastructure investment
(regional average, 2019 estimate)



0.4% of GDP
Infrastructure gap
(regional average, 2019 estimate)



83.4
Infrastructure quality
(1-100, 100 is best, regional average, 2019)



\$26,746 million
Private infrastructure investment
(5-year average, USD, 2019)

Top performing metrics



94/100

Cost to start a business



87/100

Financial stability



86/100

Transparency in public procurement

Opportunities to grow

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



12/100

Long term GDP growth trend



46/100

Gross government debt



53/100

Average procurement duration – transaction RFP

Group members

Austria	Finland	Italy	Slovenia
Belgium	France	Netherlands	Spain
Croatia	Germany	Poland	Sweden
Czech Republic	Greece	Portugal	United Kingdom (UK)
Denmark	Ireland	Slovak Republic	Romania
			Russia

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.gihub.org/>

GOVERNANCE		REGULATORY FRAMEWORKS		PERMITS	
Post-completion reviews?	18/21 -	Effect of taxation on incentives to invest	40 ↑	Cost to start a business	94 ↑
Infrastructure or PPP unit/agency?	18/21 -	Prevalence of foreign ownership	67 ↑	Dealing with construction permits	46 ↑
Recovery rate	69 ↓	Product market regulation, network sectors	67 -	Quality of land administration	76 ↑
Rule of law	71 ↓	Regulatory (including competition) quality	72 ↑	Registering property	73 ↓
Shareholder governance	52 ↑	Strength of insolvency framework	78 -	Time required to start a business	73 ↑
Political stability and absence of violence	60 ↑	Investment promotion agency?	21/21-		
PLANNING		PROCUREMENT		ACTIVITY	
Published project pipeline?	18/21 -	Average procurement duration – transaction RFP	53 ↓	Infrastructure investment	37 ↑
Published infrastructure plan?	11/21 ↑	Degree of transparency in public procurement	86 ↑	Private infrastructure investment	11 ↓
Preparation of PPPs	63 ↑	Published procurement guidelines?	18/21 ↑	Value of closed PPP infrastructure deals	22 ↓
Economic analysis assessment?	17/21 -	Procurement of PPPs	81 -	Value of closed infrastructure deals with foreign equity sponsorship	31 ↓
Market sounding and/or assessment?	13/21 -	PPP contract management	60 -		
Environmental impact analysis?	20/21 -				
FUNDING CAPACITY		FINANCIAL MARKETS		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.	
GDP per capita	45 ↑	Domestic credit to private sector	40 ↓		
Gross government debt	46 ↑	Financing through local equity market	50 ↑		
Long term GDP growth trend	12 ↓	Stocks traded	28 ↑		
Summary credit rating	78 ↑	Financial depth	59 ↑		
		Financial stability	87 ↑		

Metric key:

↑ Increase from InfraCompass 2017

↓ Decrease from InfraCompass 2017

- No change from InfraCompass 2017

Note:

The income groups are based on the [World Bank classification](#) as of July 2019, which is calculated using the [World Bank Atlas method](#).

'Top performing metrics' and 'Opportunities to grow' are based on the average of normalized scores within the income group.