



Exporting to **THE NETHERLANDS**

—
A guide for clients

Going Global

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Home

Eurozone Global Guides

The Netherlands at a Glance

Why Export to The Netherlands

Get Ready to Do Business in The Netherlands

Things to Consider

Key Opportunities in The Netherlands

Legal and Taxation Information

Helping You Win in The Netherlands

Contact Us

References

Eurozone Global Guides



Enterprise Ireland in the Eurozone

The Eurozone markets are a cornerstone of Enterprise Ireland's strategy to accelerate market diversification in order to continue to deliver sustainable economic growth. The ability to seek out new international opportunities and capitalise on them will be a key success factor for Irish companies in the period ahead. In addition, as part of the governments stated ambition to grow the domestic SME sector, Enterprise Ireland is committed to increasing the number of new exporters in the Eurozone.

The EU single market is particularly attractive for Irish exporters thanks to the absence of customs and tariffs as well as regulatory alignment in many areas. The absence of foreign exchange costs in the Eurozone market is an additional attraction in those 19 countries who have adopted the euro.

While the multinational sector has reaped the benefits of the single market, Irish owned businesses have yet to take advantage of what is the biggest Free Trade Agreement in the World.

Enterprise Ireland client exports to the Eurozone (2020: €5.8bn) are less than 80% of the value of those to the UK (2020: €7.51bn) despite the fact that the Eurozone population and Eurozone GDP is 5 times that of the UK.

Enterprise Ireland's Eurozone Strategy aims to inspire and support more companies to enter and scale in Eurozone markets. Since it was launched in 2017 exports to the Eurozone have increased by over 33% (to 2019); growth in Enterprise Ireland client exports increased by 15% in 2019 alone and increased by 1.6% in 2020 despite the challenges of Covid. However, the markets still remain relatively untapped and Enterprise Ireland is committed to continuing this strong growth.

Enterprise Ireland's Eurozone Strategy ultimate goal is for the Eurozone market to become an extension of the Irish domestic market for Irish businesses. It seeks to do this by creating an awareness of the opportunities afforded by a single market and a single currency and by providing the necessary supports to Irish owned businesses to exploit them.



Enterprise Ireland currently has 8 offices in 6 countries across the Eurozone

Country	Offices	2020 exports
Netherlands	Amsterdam	€1.71bn
Germany	Dusseldorf, Munich	€1.29bn
France	Paris, Lyon	€1.1bn
Belgium	Brussels	€546m
Italy	Milan	€431m
Spain	Madrid	€356m
Total Eurozone		€5.856bn



Amsterdam

Capital



17.4m¹

Population



€50,382²

GDP per capita
2020



€1.71bn³

Enterprise Ireland
Client Exports 2020



For more information: Watch video



Why Export to The Netherlands

The Netherlands is half the size of Ireland, yet the Dutch have left their mark on the world as innovators, trailblazers and world-class business professionals. The Dutch are active worldwide in providing creative and sustainable solutions for global challenges relating to water, food, energy, health, environment, and security.

The Dutch data centre community, which also houses the Amsterdam Internet Exchange (AMS-IX), is growing continuously with 18% average growth in take-up of data centres in the last seven years in the Amsterdam region.⁴ It is ranked number one in the world for Digital Infrastructure and Digital Intensity⁵.

Ranked number one in the world for overall logistics performance⁶, the Netherlands is home to world-class seaports and airports and an extensive network of railways and highways⁷. It is ranked number one in the world for Digital Infrastructure and Digital Intensity and number two for online connectivity⁸. You have access to 170 million consumers within 500km⁹. The combination of a strong financial sector, a fast-growing tech ecosystem and high adoption rates of new technologies, makes Amsterdam the perfect hub for FinTech. The financial sector is the largest in the Netherlands. Amsterdam hosts one of the fastest-growing start-up ecosystems in Europe, Amsterdam is ranked Third Best City for Start-ups and fifth for scale-ups in the European Digital City Index 2016 by Nesta¹⁰.

The Netherlands already has a robust healthcare and pharma landscape with companies like MSD, Jansen, TEVA, Takeda, Omron, Konica Minolta and many more. This is strengthened by the recent opening of the European Medicines Agency (EMA) in Amsterdam in March 2019¹¹. The Netherlands represents an ideal market for first-presence and scaling-up in mainland Europe, from which a European export strategy can be grown. The culture is direct and early-adopting which makes for shorter sale cycles, reducing client risk.



Get Ready to Do Business in The Netherlands

The Dutch business culture is one characterized by egalitarianism and openness, as reflected in their horizontal structure.

The Dutch are known for their 'Afspreek' (meetings) which are viewed as important discussion opportunities for all involved. Generally dressed casually, formal attire is only expected in meetings.



Travelling and geography

Located in the heart of Europe, bordering Belgium and Germany, the Netherlands is a first-rate location for any international business whose activities expand into Europe. It provides quick and easy access to the European market, with access to 95% of Europe's consumer market within 24 hours¹².

Amsterdam's Schiphol Airport is ranked number two in Europe in terms of direct connectivity, with the Port of Rotterdam ranking number one in Europe, and number two globally¹³.



Language

Dutch is the national language and with 90% of locals speaking English, it is no longer considered a foreign language¹⁴. 69% of students in secondary level education study two or more languages, and with over 180 nationalities residing in Amsterdam alone, the Netherlands is a rich tapestry of polyglots¹⁵.

In light of global travel restrictions, we are advising all clients to regularly review the Government of Ireland advice at www.gov.ie/, travel advice from the Department of Foreign Affairs, business continuity advice from the Department of Enterprise, Trade and Employment and the World Health Organisation website.

Get Ready to Do Business in The Netherlands

(continued)



ROUTES TO MARKET



Direct sales from Ireland

Unlike other markets, local representatives aren't always necessary. As a country heavily reliant on exports itself, the Netherlands is home to businesses that are naturally open to being prospected by international companies. However, as a general rule, your route to market will be smoother when you have a local partner and this usually leads to higher levels of sales.

Consultants/commercial agents

An agent is a self-employed person who acts as an outsourced sales resource, and can be an attractive option in the Netherlands. They can help you build sales leads more quickly and can be useful if you need to obtain certification for your product. Enterprise Ireland can put you in touch with possible agents in the market. We can also connect you with business accelerators/experienced consultants with expertise in your sector.

Partnerships

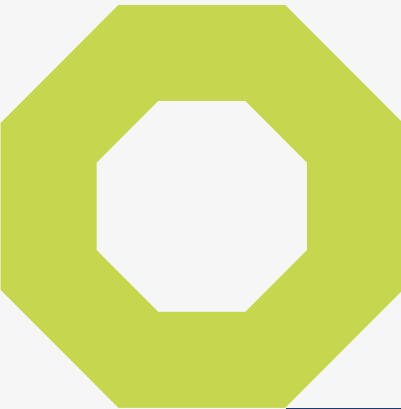
Partnership agreements with an established company can be a way to gain a foothold or build sales opportunities which might otherwise be difficult for new entrants. Ensure you have a proper agreement in place, setting clear targets and responsibilities.

Distribution/logistics

Having a distributor that purchases the product from you and resells it in the Netherlands enables you to take advantage of their leads and potential clients. The country is particularly well served in this respect with the Port of Rotterdam ensuring easy access for physical goods into the market. Distributors must be managed on an ongoing basis to ensure they are representing your brand effectively.

Joint ventures

Joint ventures and acquisitions can be a successful route to market in the Netherlands, gaining you a foothold and bringing on board established contacts and market knowledge.



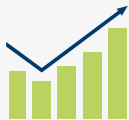
Things to Consider



Market landscape

The Netherlands is a global pioneer in several markets, with confidence high and labour market strong, this is an ideal time to step into the gateway to Europe.

Ranked number four in the EU on the 2020 European Innovation Scoreboard, the Netherlands is home to an attractive test market, adaptive consumers and an open culture¹⁶.



Market trends

The Dutch economy experienced an historical rate of contraction in GDP in 2020 but is expected to make a strong recovery with a forecast growth of 3.0% in GDP for 2021. The unemployment rate is 3.6% as of Q1 2021 and GDP growth in 2020 was -3.7%¹⁷.

According to the World Economic Forum, the Netherlands is number four in the global rankings of economies likely to recover the fastest from the Covid-19 pandemic. This forecast recovery has been attributed to the country's high-quality digital economy and digital infrastructure¹⁸.



Target market

Dutch companies are innovative and pioneers when it comes to trialling new ideas, 31% of which make up the archetype "Fast Moving Experimenters", compared with the rest of the world at 21%¹⁹.



Market segmentation

Over 8,000 multinational companies operate in the Netherlands, the majority being in manufacturing (28%), transport and storage (27%), information and communication (25%) and retail and wholesale trade (20%)²⁰.

With over 443,000 SMEs operating in the Netherlands, mid-sized companies are expecting the highest growth in the coming years²¹.



Competitors

It is a highly competitive landscape, with more than 15,000 foreign companies making up 50% of its GDP²².

The Dutch are known for their co-operation, commitment, and cross-sectoral collaboration providing unique business opportunities.



Market research resources

Enterprise Ireland's Market Research Centre offers client companies access to market intelligence in the form of company, sector, market and country information to explore opportunities and complete in international markets.

Enterprise Ireland can help you establish connections with trade agencies, at local and city level for a more dynamic and effective overview of the relevant sector.

As part of a number of associations within the Netherlands, Enterprise Ireland can provide access to a vast network and knowledge bank, in a supportive open environment.



Boots on the ground

Having a consistent presence, using local people and services to develop local business is a formula for success here, as it shows commitment to the business relationship.

Key Growth Opportunities in The Netherlands



Life Sciences and Health

Ranked eighth in the world for life sciences and health patents, the Netherlands houses approximately 3,100 R&D companies in the life sciences space, as well as 420 biopharmaceutical companies²³.

With the move of the EMA to Amsterdam in 2019²⁴, Amsterdam is one of the most densely populated life science markets anywhere in the world.

The Netherlands offers world class resources for R&D of Intellectual Property (IP) with the Dutch Government keen to boost further opportunities through public-private partnerships²⁵.



Agri-food

The Netherlands is the largest exporter in the EU of agri-food and second largest globally, with the highest concentration of cold storage in Europe, totaling €90.3 billion in 2018, including milking robots or machinery²⁶.

Of the top 20 largest global agrifood companies, 15 have production or R&D sites in the Netherlands. The Dutch agrifood sector is also home to companies like Beyond Meat and Innocent Drinks,

some of the most innovative and fast-growing companies in the market²⁷. Agri exports are dominated by domestically produced goods, contributing more than 10% to the Dutch national GDP²⁸.

Dutch consumer values are impacting the sector showing opportunities in sustainability and eco-friendliness focus future like packaging solutions²⁹. In 2019, the Netherlands exported € 94.5 billion of goods related to agriculture, such as agricultural machinery, machinery for the food industry, greenhouse materials, fertiliser and plant protection products. This represents an increase of 4.6% on 2018³⁰.



Logistics

The Dutch logistics sector generated €55 billion in 2017 with over 813,000 employees. With two significant European cargo main ports, Schiphol Airport and the Port of Rotterdam, the Netherlands is a key logistics hub for the through-transportation of goods into Continental Europe, ranking sixth in the Global Rankings 2018, and was the only country to receive a perfect score in the 2018³¹.

Housing more European distribution centers than all of its neighbors combined, the Netherlands remains the model for European logistics excellence, with favorable policies that attract heavy foreign investment.



Chemicals

There are eight major chemical-industrial clusters in the Netherlands, hosting over 2,000 chemical companies, which include 19 of the top 25 companies in the world³². These companies benefit from the Netherlands' superior logistics infrastructure and innovative R&D ecosystem.

Future opportunities here focus on reducing the Netherlands' greenhouse gas emissions by 80-95% by 2050³³. This will be done through focusing on six solution themes: Closure of the materials chain, alternative feedstock, energy efficiency, renewable energy, Carbon Capture and Storage (CCS); and sustainable products³⁴.

There is also a focus on smart materials such as responsive materials and coatings, functional ingredients, thin film technology, structural reliability and materials in integrated products.



Financial Tech

The Netherlands' finance sector provides 200,000 jobs, with an additional 20,000 working in FinTech. The majority of these finance and FinTech jobs are in the Amsterdam Area, which is the world's capital of green finance³⁵.

Ranked as the second biggest Fintech nation of the EU, the Netherlands is home to a dynamic ecosystem of companies ranging from start-ups to more well established companies like Ayden, Flow

Key Growth Opportunities in The Netherlands

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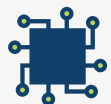


Traders and Optiver, making the financial services value chain a diverse landscape of collaborative opportunities.

Dutch banks have always been pioneers of FinTech with online and mobile banking, as it boasts the fewest cash payments and 63% mobile banking penetration – the highest in Europe³⁶.

The Dutch Trade and Logistics Innovation Program looks to create sustainable, collective solutions to support FinTech in the logistics sector.

Events like Money 20/20, AltFi, Backbase and Amsterdam FinTech Week attract key players, where ideas and partnerships can be ignited. The current main sectors of growth are in online payments, identification and security solutions, with growing interest in new technologies in the field of legislation and regulations.



High-Tech Systems and Materials

The high-tech ecosystem is the fastest growing sector in the Netherlands which offers opportunities particularly in semiconductors, sensor technology and high-tech systems.

Efforts are being made to digitize the sector to reduce waste in the chain and grow services.

Nanotechnology in the smart city project are a keen focus due to the lower capital investment required³⁷.

The MedTech market is valued at €4.7 billion with 700 suppliers, 97% of which are SMEs³⁸.

Industrial machinery, electronic equipment and construction machinery make up the majority of the deals in the sector.

Future growth prospects lie in medical diagnostics, Information and Communications Technology (ICT), energy and climate and agri-food.



Construction

The Dutch Government plan to invest significantly in the development and improvement of the country's infrastructure.

They have announced an allocation of €25 billion to the construction of new roads, and €1.9 billion to the maintenance and replacement of roads, railways, waterways, dams, and dykes

The national Delta Programme 2021 outlines proposals for revised strategies, and measures aimed at an effective continuation of the work on flood risk management, on the availability of fresh water, and on having the Netherlands climate-proof and water resilient by 2050³⁹.

Having built the world's first habitable 3D printed houses and bridge, the Netherlands is a country

bringing innovative ideas to life. Several companies now focus on supply chain integration and mass customization⁴⁰.

Rijkswaterstaat (Dutch Public Works and Water Management) is one of the biggest public clients in Europe and leader in BIM implementation⁴¹.



Energy

The Netherlands is the first country whose energy transition plans look to phase out natural gas, with a 49% carbon reduction by 2030, with CCS being a crucial factor to achieve this⁴².

Continued investment in wind power and other renewable sources is also top of the Netherlands list. With world-class R&D facilities and incentive programs to support energy innovation, there is heavy investment in smart grid innovations and solutions – and plans to build the world's largest windfarm.



Aerospace

South Holland is home to a thriving aerospace sector and directly employs 7,320 people and indirectly employs 12,500 people. The region is also home to Europe's largest aerospace faculty at TU Delft and welcomed the arrival of space research institute SRON in Leiden in 2021⁴³.

Key Growth Opportunities in The Netherlands

(continued)



The largest European Space Research and Technology Centre (ESA/ESTEC) R&D facility in Europe is located in the west of the Netherlands, which hosts the complete chain from R&D through OEMS, suppliers to end user⁴⁴. This cluster houses over 300 direct suppliers in the manufacturing process in world-class space business facilities⁴⁵.

The main areas of expertise lie in satellite communication systems, nano satellites, UAVs, earth observation, airport operations and new materials and composites.

The Dutch Maintenance, Repair and Overhaul (MRO) industry is continually seeking innovative ways, especially through: Corrosion treatment, composite maintenance, avionics, electronics assembly, and the development and production of parts⁴⁶.

Information Technology (IT)

One of the most wired countries in the world, with one third of all European data centres located in the Amsterdam area, the Netherlands is home to the world's largest internet exchange, AMS-IX. A further two million square feet of data centres are

expected to be added in the coming years, Along with Google's €500 million data centre expansion which is expected to be completed this year⁴⁷.

Ranked fourth globally in app invention and development, 60% of all Forbes 2000⁴⁸ companies active in Information Technology (IT) have established an office in the Netherlands, in a country with over 57 international tech companies in the sector.

Global IT companies like Microsoft, Cisco, Interxion, Infosys, Huawei, Oracle, Intel, IBM, Verizon and Google tap into an unparalleled IT infrastructure, a competitive tax climate and a tech-savvy, English-speaking workforce in the Netherlands⁴⁹.

Water

With 26% of the country below sea level, the Netherlands is a key player in the marine, delta and water sector⁵⁰. The Dutch Organization for Scientific Research have invested €1.5million into Artificial Intelligence (AI) in this sector.

The Netherlands is stimulating horizontal collaborations across various sectors (logistics,

energy and finance) to secure their place as front runner in AI, cyber security and blockchain.

Creative Industries

The Netherlands is dubbed a "creative powerhouse" resulting in €7.1 billion annual turnover⁵¹. With forward-thinking brands such as Uber, Netflix, Tesla, and Google making it their home, the Netherlands is the third global country for creative outputs. With over 1,300 advertising agencies, 300 games companies, 1,300 local fashion designers, the country is a hub of opportunities for collaboration for the 170,000 people working in the sector⁵². With a highly interactive community, and numerous events occurring weekly to network and showcase your company across the sector, this powerhouse is built on community.

Key Growth Opportunities in The Netherlands

(continued)



Sustainability

The Netherlands is committed to reaching the 17 Sustainable Development Goals (SDGs) as set out by the United Nations in 2015, and this commitment has since framed the country's policy development in key areas. As is characteristic of the Netherlands, a collaborative approach between the public and private sector, as well as knowledge institutions, CSOs and more will be key in the successful adoption of policies and practices to drive the achievement of their ambitious targets.

Some of the focus areas within the SDGs for the Netherlands are as follows:

Transition to a circular economy by 2050 (<https://www.government.nl/topics/circular-economy/circular-dutch-economy-by-2050>)

Renewable energy production and greenhouse gas emissions reduction (https://ec.europa.eu/energy/topics/energy-strategy/national-energy-climate-plans_en)

Sustainable innovation and investment (<https://smartstories.nl/11.html>)

Establishing a fair and efficient water supply (<https://www.government.nl/documents/reports/2014/12/23/summary-planmer-nwp-2016-2021>)

More sustainable food production (<https://www.government.nl/topics/food/government-promotes-sustainable-food-production>)

Renewable energy is an area of strong focus for the Dutch, as the country houses one of the largest offshore wind farms and the largest floating solar energy park in Europe. This combined with their strong capabilities in agri-food, and logistics and transportation means that they are well positioned to reach their target of zero greenhouse gas emissions by 2050 as laid out in the Paris Climate Agreement⁵³.



Hydrogen

Given its high-quality infrastructure and existing capabilities in construction and logistics, the Netherlands is in a unique position to develop large-scale hydrogen infrastructure.

A hydrogen strategy and policy agenda has been set out by the Dutch Government which outlines opportunities for the production and consumption of hydrogen across a number of industry sectors.

Capitalizing on these opportunities will help them to achieve the ambitions set out in the country's National Climate Agreement whereby the main goal is to achieve a 49% reduction in national greenhouse gas emissions by 2030⁵⁴.

Legal & Taxation Information



Visa requirements

For all EU nationals, no visa is required. For visitors staying more than 90 days (in a period of 180 days), a residence permit is required to legally be allowed to stay in the Netherlands, see: <https://business.gov.nl/coming-to-the-netherlands/permits-and-visa/coming-to-the-netherlands-for-a-business-visit/>

Please refer to government advice for latest information on travel restrictions



Customs information

The Dutch customs are highly experienced and specialised, working in a highly digitized environment. It is easier to obtain customs licenses in the Netherlands than in other EU countries.

For an overview of customs permits see: https://www.belastingdienst.nl/wps/wcm/connect/bldcontentnl/belastingdienst/douane_voor_bedrijven/naslagwerken_en_overige_informatie/overzicht-douanevergunningen

For import taxes into the Netherlands information, see: https://www.belastingdienst.nl/wps/wcm/connect/bldcontentnl/belastingdienst/individuals/abroad_and_customs/receiving_goods_from_abroad/from_organizations_and_companies/how_do_i_calculate_these_import_taxes

For the latest information on consequences of Coronavirus for your customs affairs, see https://www.belastingdienst.nl/wps/wcm/connect/nl/douane_voor_bedrijven/content/coronavirus



Corporate structures-intellectual properties, contractual terms and conditions, employment

Companies looking to establish a legal entity in the Netherlands have three options: Establish business permanently, temporarily, or have personnel working here with no establishment.

There are several ways for a foreign company to operate a business in the Netherlands:

- Corporate entities – B.V. or N.V. or Co-op.

- Non-corporate entities – partnerships or sole trader. For further information see: <https://business.gov.nl/starting-your-business/choosing-a-business-structure/business-structures-in-the-netherlands-overview/>

The District Court of the Hague has exclusive jurisdiction over patent matters in the Netherlands, and has become one of the most specialised courts in the EU. For further information, see: <https://www.government.nl/topics/taxation-and-businesses/corporation-tax>

Structural reforms are underway to increase labour participation, through open-ended contracts, along with tax cuts on low-income and second-earners.

Irrespective of which, any employee performing their operations in the Netherlands results in the application of certain mandatory provisions of Dutch employment law.

In January 2019, the Netherlands Commercial Court was created to resolve international business disputes through English-language proceedings and judgments. See: <https://www.rechtspraak.nl/English/NCC/Pages/default.aspx>



Tax structures

At present, the corporate tax rate is 15% on the taxable amount up to €245,000 and 25% on excess.

<https://www.government.nl/topics/taxation-and-businesses/corporation-tax>

<https://www.duitjntax.com/en/dutch-corporate-income-tax-rate>

<https://www.government.nl/topics/taxation-and-businesses/corporation-tax>

The Dutch tax system offers several competitive features in areas such as:

- R&D tax credit for qualifying R&D wage costs.
- Tax relief programme for sustainable energy investments (EIA).
- Corporate tax rate of 9% for qualifying profits in the “Innovation Box” on technical innovation.
- Tax relief for environmentally friendly investments.

Helping You Win in The Netherlands



Enterprise Ireland's Dutch office leverages the deep commercial knowledge of our Market Advisors and the relationships we have built with both international and domestic networks, to deliver value for our clients.

Through pre-visit support, we can provide regularly updated sectoral overviews of the Dutch market, suggest channels to market, a competitor analysis and evaluation of your market entry strategy. Through our network, we can arrange meetings with relevant contacts to gain a deeper insight into the market first hand.

In market support, we can provide introductions to buyers and decision-makers, identify potential partners, and assist with product launches and workshops.

Every year Enterprise Ireland organises an extensive programme of events to support your business abroad. These include:

- Inward buyers missions to Ireland
- Group stands at international trade fairs
- Trade missions to the Netherlands
- Study visits to gain knowledge of the Dutch market
- Client knowledge events including seminars and workshops
- Networking events to build and enhance relationships with market contacts
- Further information is available at www.enterprise-ireland.com/events

Enterprise Ireland's Netherlands office has built up an excellent network of individuals who are able to work with our Irish client companies on developing their business. This includes market and sector specialists, business accelerators and members of Irish business associations, such as the Ireland Netherlands Business Association, see: <https://www.inba.nl/>

We can further offer access to translation and interpreting services, as well as introductions to specialists in all areas including legal, recruitment, PR and taxation.

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<https://globalambition.ie/markets-opportunities/netherlands/>

Going Global



Rialtas na hÉireann
Government of Ireland



Ireland's EU Structural and
Investment Funds Programmes
2014 - 2020

Co-funded by the Irish Government
and the European Union



European Union
European Regional
Development Fund

Ireland's European Structural and Investment Funds Programmes 2014-2021.
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