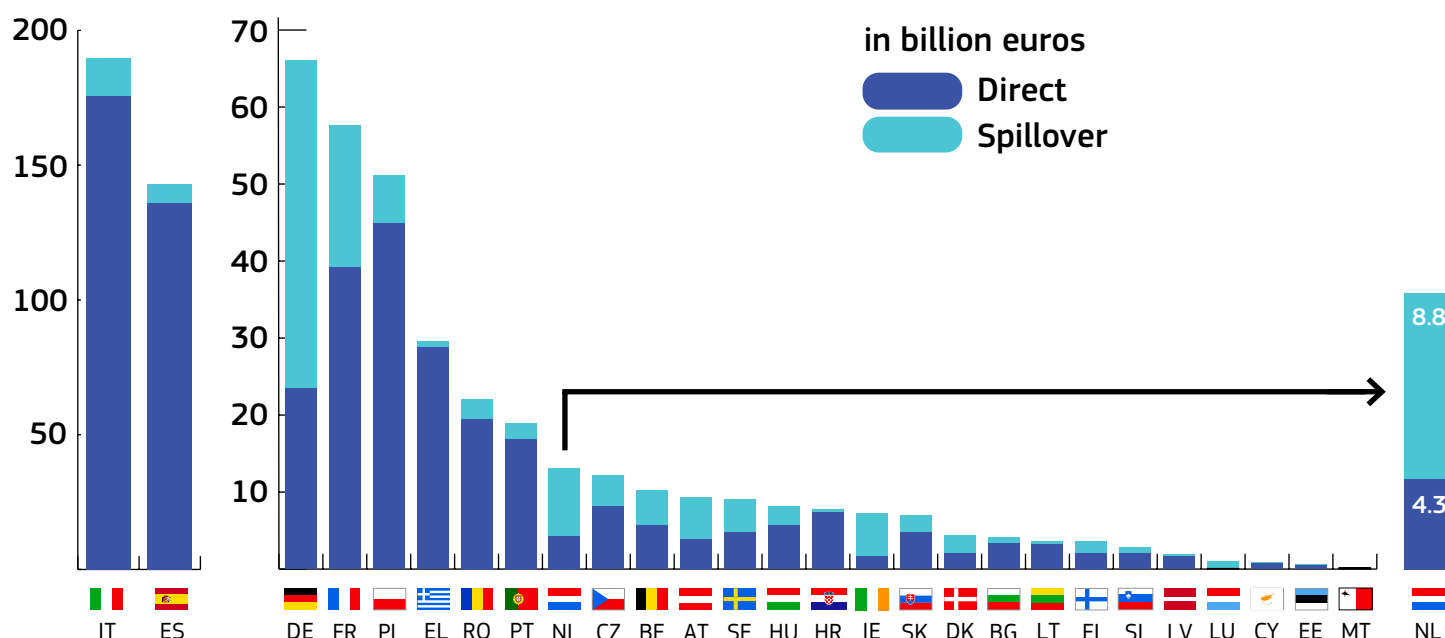


ECONOMIC IMPACTS OF THE RECOVERY AND RESILIENCE FACILITY: THE CASE OF THE NETHERLANDS

#NextGenEU | JULY 2025

The Recovery and Resilience Facility is estimated to **increase the Netherlands' GDP by €13 billion** between 2020 and 2030, **more than double the size of its own national recovery and resilience plan** (€5.4 billion). **The Netherlands are one of the largest recipients of spillovers** from other Member States' plans across the EU. **Spillover effects, estimated at €8.8 billion, account for more than two-thirds of the total impact.**



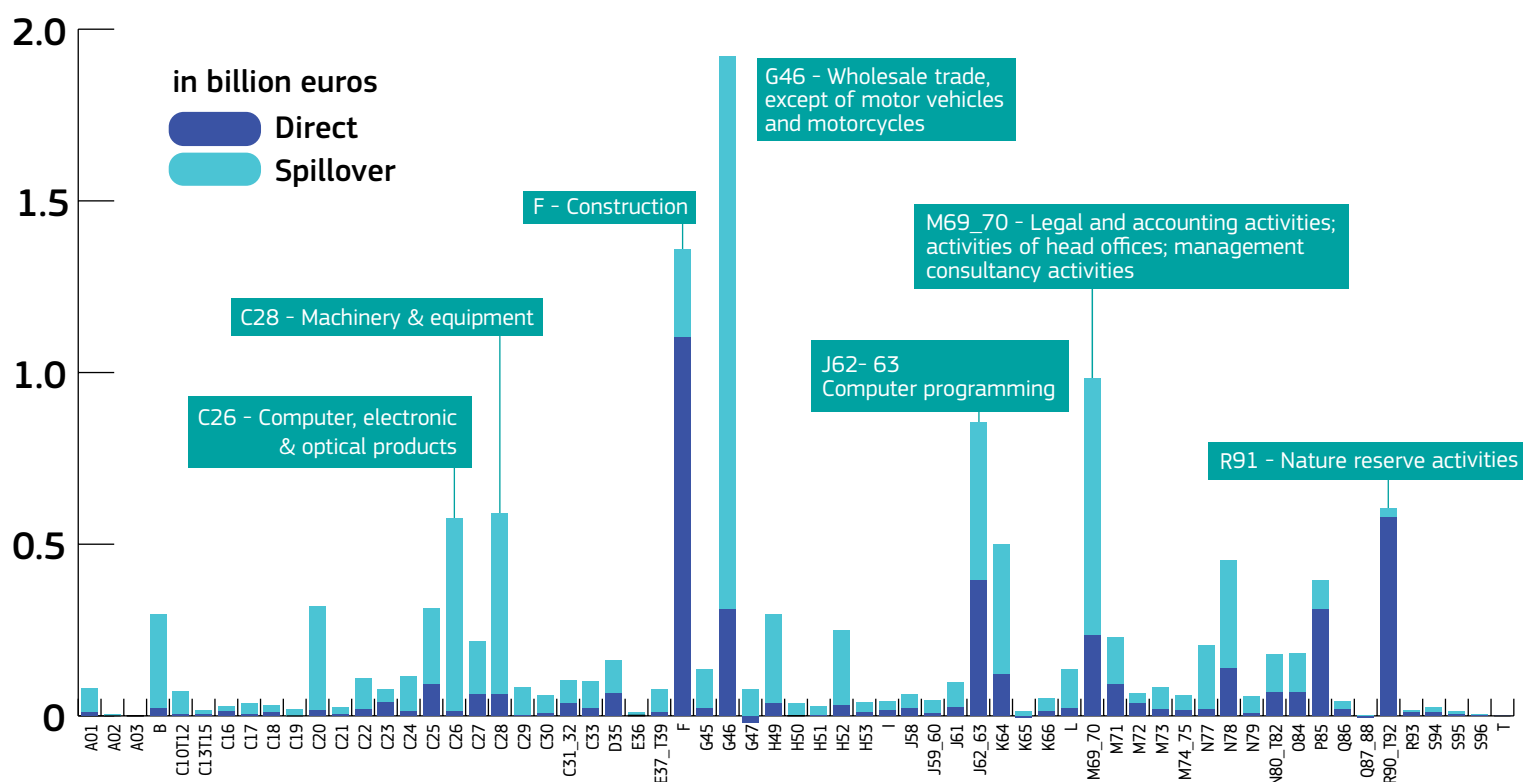
Direct economic impacts appear in a country from the delivery of its own recovery and resilience plan via the immediate boost in production and employment in national industries.

Spillover impacts arise from higher exports of final and intermediate goods to other Member States due to the implementation of their national plans.

The analysis is based on the [Discussion Paper on Economic Impacts of the RRF](#) published on 21 May 2025. The estimates date from June 2025 and assume full implementation of all national plans. The figures do not account for the impact of reforms or welfare effects.

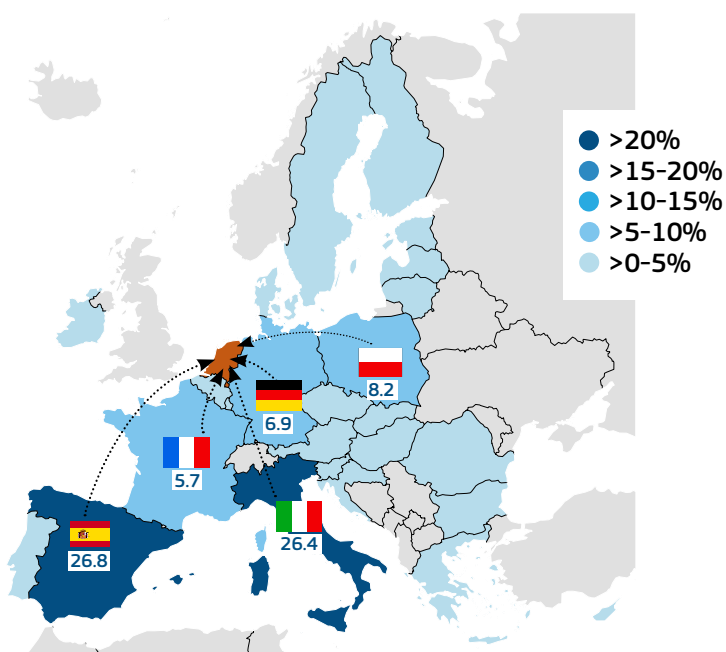
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In the Netherlands, **wholesale trade, manufacturing of electronics, machinery and equipment as well as legal and accounting services** are the ones benefitting the most from spillovers from other countries plans. **The construction sector and nature reserve activities** benefit the most from direct effects of the Netherland's own plan.



The economic sectors are based on EUROSTAT NACE codes.

The main sources of spillovers to the Netherlands are Spain (26.8% of total spillovers to the Netherlands are coming from Spain), Italy (26.4%), Poland (8.2%), Germany (6.9%) and France (5.7%).



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EXAMPLES OF FIRMS BENEFITTING FROM THE DUTCH PLAN

Zero Emission Services – Emission-free inland shipping

House of Quantum – Quantum technology ecosystem


Klimaatgarant – Improving energy efficiency of dwellings

Hygro Energy – Innovative green hydrogen technologies



EXAMPLES OF DUTCH FIRMS BENEFITTING FROM OTHER COUNTRIES' PLANS







Allego |  charging stations

Arcadis |  consulting services for low emission mobility & design of the future mobility hub

Damen Shipyards |  naval platform

Gasunie |  connect the Belgian and Dutch hydrogen networks (partnership with Fluxys)

NXP |    microelectronics

Philips |   technical medical equipment
  robotics and AI for socio-economic empowerment
  hospital equipment

Randstad |  counselling services

VDL |    hybrid/electric buses

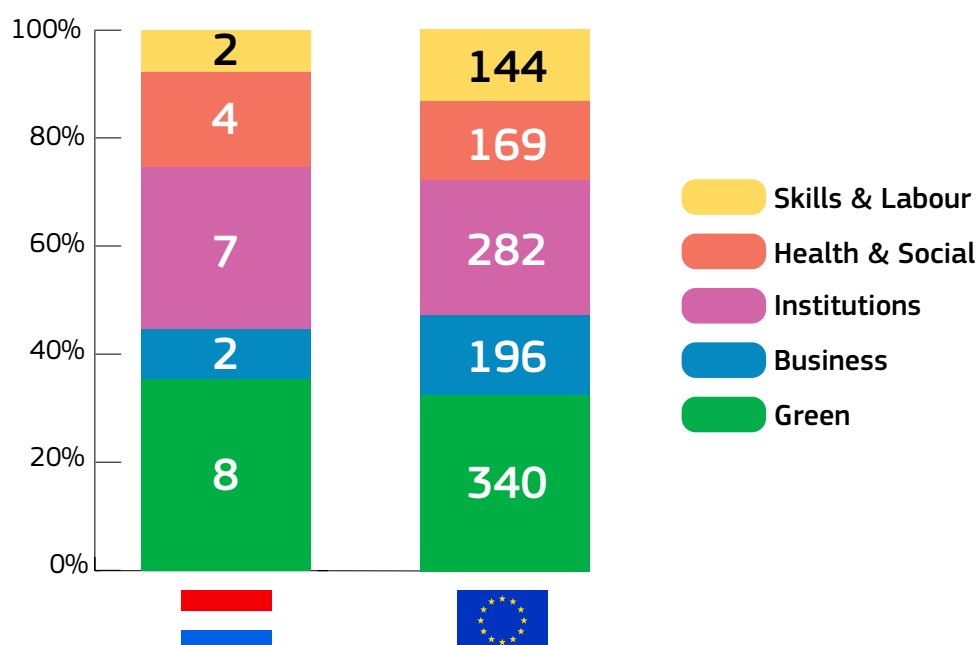
Wolters Kluwer |  counselling services



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Reforms

The figures above do not factor in RRF-funded reforms which are expected to significantly increase the overall economic impact. Across the EU, the RRF finances 1131 reforms which we grouped into five broad economic categories. The Netherlands plan includes 23 reforms with an emphasis on reforms related to the green transition and public institutions.



EXAMPLES OF DUTCH REFORMS

The **Open Government Act** strengthens the scope of the transparency requirements of public and semi-public authorities. It includes an active disclosure obligation and shortens the processing period for requests for information. This way, public sector information will be easier to access digitally by citizens, companies and the press.

The Energy Market Reform package tackles several challenges related to energy markets the Netherlands is facing. It addresses congestion on the Dutch electricity grid by providing additional instruments to grid operators for flexible grid use and shortens permitting procedures for electricity grid expansion projects.

The reform to accelerate residential construction processes improves knowledge of municipalities and construction companies about the planning procedures. It establishes expert teams that can help municipalities and housing corporations to address bottlenecks in the planning procedures for the realisation of new dwellings.

