

# **The Services Sector in the Dutch Economy: Economic Contribution and External Trade Performance**

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**Abstract:** This study aims to present the structural dynamics and the contribution of the services sector to the Dutch economy, as one of the European Union countries that serves as a leading model for service-based economies. A descriptive-analytical approach was used to analyse official Eurostat statistics on the services sector for the period 2010-2020, while trade in services data extend to 2024. Results reveal that the services sector plays a pivotal role within the Dutch economy, contributing significantly to value creation, profitability, and foreign trade, including exports and imports. Despite its flexibility and diversity, the services sector remains vulnerable to global fluctuations, emphasizing the need for strategic investment and policy support to maintain competitiveness and long-term growth. This study is limited by the absence of 2017 data for the services sector, and the small sample size used in the regression models. The contribution of this study lies in providing a quantitative analysis that complements previous qualitative studies and sheds light on its role in the Dutch economy and international trade. More comprehensive future research, in terms of both data and period, could be recommended, including a study of the impact of global factors on the service sector in the Netherlands, or a comparison with specific countries.

**Keywords:** Service sector; service economy, trade in services, economic competitiveness, Netherlands

**JEL Classification:** F14; L80; O52

## **1. Introduction**

As economies strive to diversify their production base and move away from dependence on, or over-reliance on, natural resources, especially non-renewable ones, the “services economy” has become a

strategic cornerstone of this economic vision. Accordingly, the services sector has transitioned from a marginalized tertiary sector to a pivotal and key sector in the modern economy, playing a role similar to that of agriculture in traditional economies and industry in industrial economies. Today, services constitute significant drivers of economic growth (Cheng, 2013). The OECD (2024) highlighted the remarkable expansion of the services sector's contribution to the economy and international trade, reaching 67% of global GDP in 2021, surpassing the industrial and trade sectors. Meanwhile, trade in services reached 13.4% of global GDP in 2022, which is double the amount recorded in 1990. The World Bank also indicated that the value added of the services sector reached 63.3% of global GDP in 2023, 72.4% in the United Kingdom, 64% in Germany, 56.7% in China and 49.9% in India in 2024 (World Bank, 2025).

Consequently, the current discussion extends beyond merely assessing the status of the services sector; it now encompasses strategies to optimize its advantages. This situation is clearly illustrated by the experience of the European Union, where the services sector supported economic growth, even though it was not a direct generator of that growth. The share of the services sector in the employment structure and its contribution to creating total added value increased between 2000 and 2023 (Kołodziejczak, 2025). Conversely, trade in services within the European Union accounts for more than a third of the bloc's total trade in goods and services. The importance of services trade has increased in comparison to goods trade over the past decade. In 2023, as reported by the European Commission (2024), trade in services within the EU constituted 25% of global services trade, with approximately €1.427 billion in service exports and €1.274 billion in service imports.

The Netherlands is distinguished as a key service hub, traditionally known as the "Gateway to Europe" and this reputation stems from its advantageous logistical position, sophisticated infrastructure, and robust financial and commercial industries. Consequently, services have emerged as a vital contributor to the nation's economy, representing roughly 77% of the Netherlands' GDP in 2023 (CBS, 2024). Furthermore, the contribution of this sector to the national GDP has fluctuated between 70% and 71% in recent years, as reported by The Global Economy (2025). Moreover, the services sector plays a crucial role in the Netherlands' foreign trade. Data indicate that the Netherlands plays a significant role in the trade of services, both in Europe and globally. (Creemers & Voncken, 2024).

Therefore, the Netherlands appears as one of the global models of an advanced service economy. From this perspective, the main problem of this study was formulated as follows: "What is the reality of the services sector within the economy of the Netherlands?"

This study aims to achieve several objectives, most notably: to evaluate the relative weight of the services sector in the Dutch economy; to analyse the performance of the Netherlands' services trade, and to identify the most dynamic service sectors that drive economic performance.

## **2. Theoretical backgrounds and literature review**

The literature on economics and international trade has long focused on the services sector, given its growing role in employment indicators, global output, cross-border transactions, and other key factors. Theoretical interest in services has grown as they have become increasingly important in modern economies. This crucial importance stems from the structural transformation theory, which posits that economies evolve from agriculture to services, transitioning through industry. This shift aligns with technological changes, rising incomes, and their impact on lifestyles and consumption patterns, resulting in a transition towards a service-oriented economy. Studies have additionally supported this trend, emphasizing the considerable positive impact of the service sector on GDP and trade performance

through its diverse activities in numerous developed economies (Briggs & Sheehan, 2019; Sasmal & Sasmal, 2024).

Conversely, Karam & Zaki (2015), Khoury & Savvides (2006), Maune (2019), and Shieh (2020) have examined the relationship between trade in services and overall economic growth, finding a positive correlation. Higher levels of trade in services positively impact GDP growth, and trade liberalization offers economic advantages similar to those of trade in goods, especially regarding enhanced productivity and greater specialization.

Other studies, such as (Beverelli et al., 2017; Shen & Liu, 2024; Yu et al., 2021) provide evidence that at the microeconomic level, services such as transportation, logistics, and financial intermediation serve as key intermediate inputs that have facilitated the improvement of manufacturing productivity while also enhancing coordination within global value chains. These studies further illustrate that easing restrictions on trade in services leads to increased efficiency in various economic activities, including access to high-quality production services. Additionally, Kox et al. (2005) demonstrated that by reducing or removing restrictions stemming from structural disparities among EU member states, there could be a 30-60% rise in commercial trade in services and a 20-35% boost in foreign direct investment in services.

Reality, as demonstrated by numerous recent global experiences, shows that trade in services has become more dynamic and the fastest-growing component of international trade, having developed significantly over the past two decades. The WTO and World Bank (2023) highlighted that services, particularly in sectors such as finance, information and communication technology, and professional business services, have evolved into a fundamental component of global trade and play a crucial role in international business and transactions, surpassing their earlier classification as simply final products. The Trade and Integration Monitor report (Inter-American Development Bank, 2025) confirms that services have become crucial intermediate inputs across various sectors, enhancing productivity and facilitating integration into global value chains. Similarly, the significance and influence of digital services, for example, have increased across various production networks worldwide, serving both as exports and as inputs (UNCTAD, 2024).

Prior research has extensively investigated the relationships between services, economic growth, productivity, and international trade; however, the focus has largely been on either cross-country comparisons or specific facets of services. In contrast, there has been a scarcity of comprehensive analytical research into the structural significance of the services sector within a predominantly service-oriented economy such as the Netherlands, particularly regarding the interaction between domestic economic performance and external trade dynamics.

Studies addressing this matter are largely confined to statistics published in reports by national or international organizations that reflect the general economic situation, rather than being incorporated into a cohesive analytical framework. This research gap motivated this study. This identified a gap in research and prompted the current study.

### **3. Methodology and Hypothesis**

The study used an analytical approach to examine data on the Dutch services sector and its economic role, including its contribution to GDP and overall performance. The data cover the period from 2010 to 2020 for the services sector and from 2013 to 2024 for trade in services and were extracted exclusively from Eurostat statistics; therefore, data from 2017 are not available in this study for the services sector due to their absence from the database. The absence of 2017 data for the services sector is one of the limitations of the study; however, the analysis is based on the data available for the other years, since

the study focuses on general structural trends rather than annual changes. In addition, the data available for the years before and after 2017 still allows for the observation and analysis of the overall development of the sector.

The study relied on the hypotheses below:

H1: *The services sector in the Netherlands plays an important role in the economic performance.*

H2: *The efficiency of the service sector in the Netherlands differs across sub-sectors.*

H3: *The services sector in the Netherlands is associated with its foreign trade.*

The study adopted a descriptive-analytical research design and analysed the collected data by quantitative methods to reach the research tasks below:

Measure the relative weight of the Dutch services sector in the economy, including evaluating its GDP's contribution and its value creation.

Assess the services trade's performance by analysing key indicators related to the volume and composition of service exports and imports.

Identify the most dynamic service sectors that are considered the growth leaders.

In addition to the previous analysis, a simple statistical test is adopted to provide an empirical measure of the relationship between key service indicators and overall economic performance in the Netherlands. It is based on correlation measurement and simple linear regression.

It is important to note that the statistical analysis used in this study does not constitute conclusive proof of causation, but rather reflects correlations between the variables used, such as value added of services, service exports and imports, GDP, and others.

The potential for endogeneity cannot be fully verified due to the annual nature of the data used in this study. At the same time, the study does not apply any extensive robustness tests or alternative model specifications. Consequently, the results were interpreted as indicators of an observed association between the expansion of the services sector and the overall economic performance of the Netherlands, given that a deeper analysis of cause and effect requires more comprehensive data and sophisticated statistical models, which are not encompassed in this study.

## **4. Research Results and Discussion**

### **4.1. The Contribution of the Service Sector to the Dutch Economy**

The Netherlands is considered one of the most important and leading models in the world in the transition towards a service-based economy, in which this sector has reached a significant contribution to GDP, value added, and many other macroeconomic indicators.

#### **4.1.1. Glimpse on the Dutch services sector**

The service sector in the Netherlands is a vital and dynamic part of its economy, with numerous institutions/establishments operating across healthcare, education, tourism, accommodation, transportation, finance, and other sectors. The figure below illustrates the evolution of the number of these establishments.



**Figure 1.** Number of service establishments in the Netherlands

Source: Prepared based on: (Eurostat, 2024)

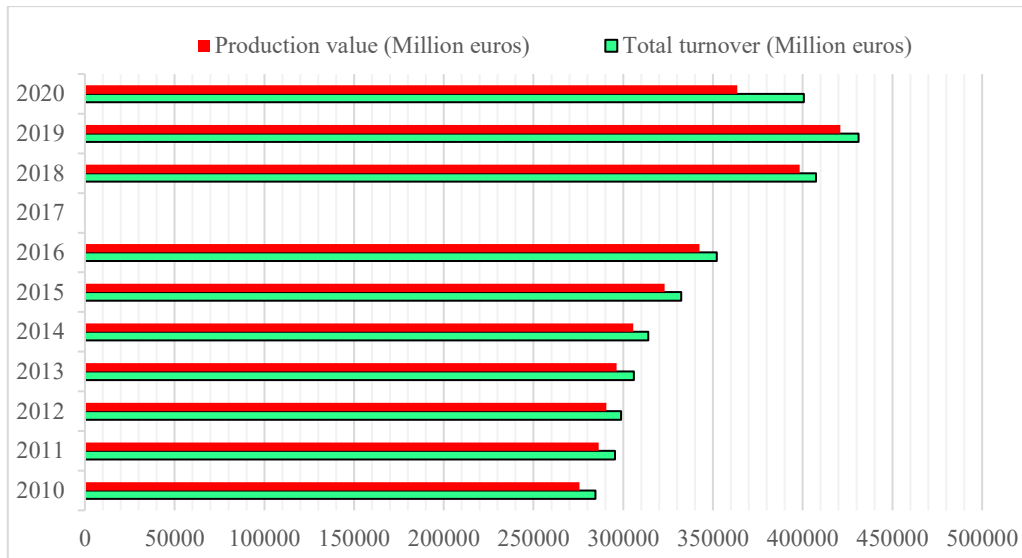
Note: Data for 2017 are treated as missing because they are not available

The results show a significant and continuous increase in the number of service establishments in the Netherlands, with the exception of the absence of statistics for 2017. The count increased from 403,902 in 2010 to 776,195 in 2020, representing a growth of 92.2%, which signifies genuine expansion through the establishment of new businesses or the growth of existing ones. These findings indicate the growing shift towards a service-based economy in the Netherlands, where opportunities for wealth and employment in this sector have been increasingly generated. Furthermore, the data indicates the establishment of 36,238 new service entities during the COVID-19 pandemic, indicating the structural flexibility of the services sector and its ability to develop new service activities that respond to changing circumstances, including those provided remotely. This adaptability enabled the Dutch services sector to navigate the significant economic challenges posed by the health crisis.

These findings are consistent with Kołodziejczak (2025), indicating a high shift towards services in wealthy EU countries, including the Netherlands, where the service sector has grown in terms of employment, economic structure, and overall value creation. Population density also plays a role in this shift towards a service-based economy. That shift is also apparent in the number of service establishments, and not just in general macroeconomic indicators. The Netherlands is distinguished from other developed countries by the dominance of the services sector in its economy, as evidenced by a more pronounced shift towards various service activities (Wache et al., 2024).

The findings also align with the literature on structural transformation theory, particularly the studies by Briggs and Sheehan (2019), Sasmal and Sasmal (2024), which point to a gradual shift in advanced economies from manufacturing to service-based economies. However, the Dutch case suggests a pattern marked by greater dynamism and resilience than the general trends revealed in the studies, especially regarding its capacity to maintain growth and generate new service activities during crises. This numerical growth in service establishments in the Netherlands confirms the transformation of this sector from a complementary or secondary one to a prominent sector in the economy.

To understand the weight of the services sector in the economy, it is necessary to know its economic performance. This performance ensures that the increase in its number of establishments has a real impact on the economy, as demonstrated by the size of its activity and its ability to generate revenue. Therefore, the following shows the development of turnover and production value in this sector as an indicator of the volume of transactions within its activities and the dynamism of the economy.



**Figure 2.** Total turnover and production value of the services sector in the Netherlands

Source: Prepared based on (Eurostat, 2024).

Note: Data for 2017 are treated as missing because they are not available

As shown in Figure 2, the turnover and production value of the Dutch services sector have been steadily growing for years. Total sales value (turnover) increased from €284.5 billion in 2010 to €431.1 billion in 2019, representing an estimated overall growth of about 51.5%, while the value of production reached €421 billion in 2019, up from €275.6 billion in 2010, representing a growth rate of 52.7%. These values demonstrate the strength of the services sector, as continued growth in sales value and production value reflects an expansion in the real value of economic activity in this sector. It is also noteworthy that turnover remained higher than production value by 2-3% annually throughout the same period, which is expected from an accounting perspective, since the value of production is calculated by adjusting turnover for changes in inventories and deducting intermediate consumption of goods and services.

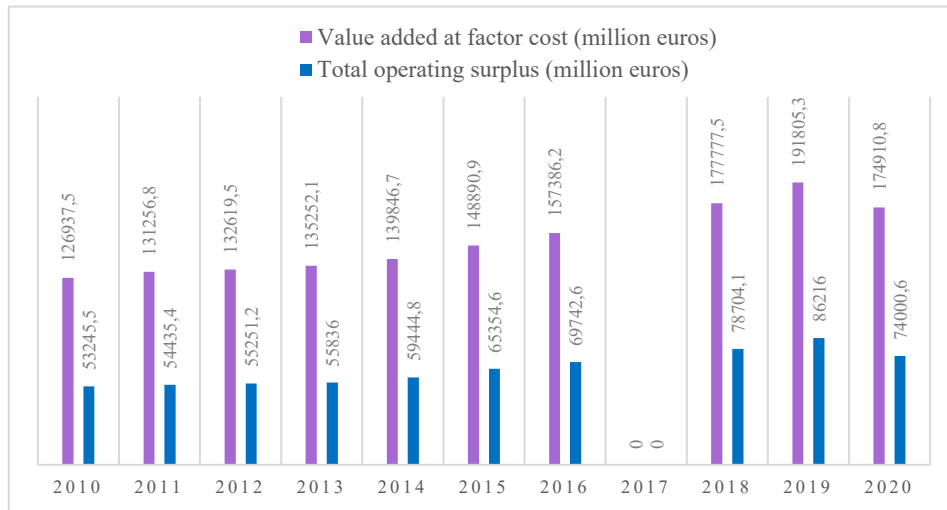
These findings are consistent with Briggs and Sheehan (2019) and Sasmal & Sasmal (2024), who highlighted the positive contribution of the service sector to advanced economies in terms of growth and value creation. Therefore, these results support those previous studies on the contribution of the services sector to Dutch economic growth and value creation, while also suggesting that the increase in the number of service establishments in the Netherlands is not merely quantitative, but was accompanied by a parallel improvement in its productive capacity.

In contrast, 2020 recorded a sharp decline in turnover and production value for the services sector, compared to 2019, by 7.1% and 13.6%, respectively, to €400.6 billion and €363.6 billion. This situation was primarily due to the COVID-19 pandemic and the accompanying lockdown and social distancing policies, which have significantly impacted various service sectors, including transportation, hotels, restaurants, and others.

Nevertheless, the Netherlands exhibits a strong expansion in both sales volume and output value for the services sector, reflecting a higher level of efficiency and value generation within this sector than the general patterns described in previous literature.

Assessing any sector within an economy involves more than merely evaluating its economic activity; it also requires an understanding of its capacity to generate economic value. That can be measured by value added, which reflects the sector's contribution to the Gross Domestic Product (GDP), and gross

operating surplus, which indicates the net profits and returns generated. The following figure 3 illustrates these indicators for the services sector in the Netherlands.



**Figure 3.** Total Value Added and Gross Operating Surplus for the Services Sector in the Netherlands  
Source: Prepared based on (Eurostat, 2024).

Note: Data for 2017 are treated as missing because they are not available

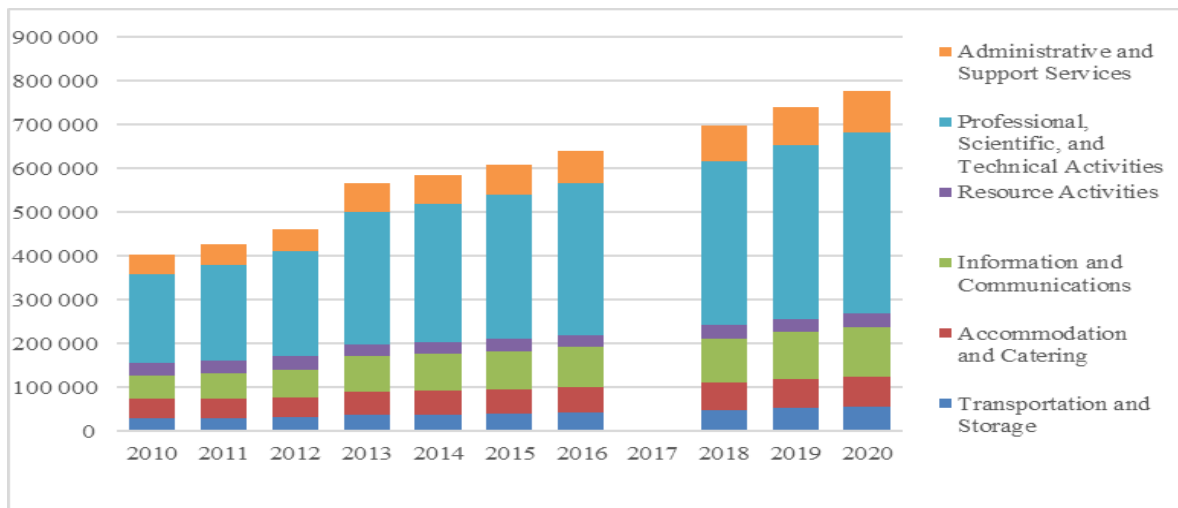
The results indicate strong and profitable performance of the Dutch services sector up to 2019, as evidenced by the growth in the sector’s added value and the continuous rise in its operating surplus. The value added of the services sector saw a significant increase between 2010 and 2019, rising from €127 billion to €192 billion, representing a growth rate of nearly 51%. These results highlight the sector’s substantial contribution to the Dutch economy, as its expansion extends beyond turnover to include the creation of added value. At the same time, the services sector’s profitability grew faster than its added value, with its operating surplus increasing from €53.2 billion in 2010 to €86.2 billion in 2019, representing an estimated growth of 62%. This significant growth in operating surplus, growing faster than added value, reflects the relatively strength and profitability of the sector, showing that service establishments in the Netherlands convert an increasing part of their added value into operating profit. However, this situation changed in 2020 due to the COVID-19 pandemic, which saw a sharp decline in the profitability of the services sector. This decline is reflected in a 14.2% drop in operating surplus compared to 2019, reaching €74 billion in 2020, and a smaller decrease in value added, estimated at 8.8%. This smaller decrease is relatively low considering the severity of the crisis and may be attributed to the relative resilience of value added in the sector. The significant decrease in profitability, compared to the decrease in value added, had a considerable impact on the profit margins of the services sector. Despite continued production, its ability to generate profit was affected due to ongoing costs such as rent and salaries, coupled with a decline in revenue.

This increase in added value demonstrates the growing economic role of services in the Dutch economy. These results reinforce what Karam and Zaki (2015), Khoury and Savvides (2006), and Maune (2019) have shown regarding a positive correlation between the expansion of services and trade within them and economic performance and GDP growth, particularly in advanced economies, which highlights services as a notable element of value creation within them.

From the previous results, the continuous evolution of service establishments, the sustained growth in turnover and production value of this sector, and the increasing contribution of value added, and operating surplus are associated with *hypothesis H1*, indicating that the services sector in the Netherlands plays an important role in economic performance.

#### 4.1.2. Structural Evolution and Subsector Composition in the Netherlands

The services sector encompasses a range of sub-fields and activities, the most important of which, apart from commerce, can be illustrated in the following figure:



**Figure 4.** Classification of Service Establishments in the Netherlands

Source: Prepared based on (Eurostat, 2024)

Note: data for 2017 are treated as missing because they are not available

Service activities in the Dutch economy span several fields, with varying numbers of establishments and annual growth rates, where the professional, scientific, and technical activities sector is the main component. It is the largest and fastest-growing sector during the study period, accounting for approximately 53% of the total number of service establishments in 2020, with 413,127 establishments compared to 201,715 in 2010, an increase of 104.9%. These results reflect an important shift in the Netherlands towards a knowledge economy, with the spread and prevalence of consulting, marketing, and technical services, and the ease of establishing small-specialized projects.

With a 14.4% share of all service establishments, information and communication activities ranked second, reaching 111,594 establishments in 2020, up from 52,968 in 2010, thus achieving a strong and stable growth of 110.7% during this period. These results are likely explained by the digital revolution in the country, driven by the growth of software, applications, and e-commerce businesses, indicating the Netherlands' centrality on knowledge-intensive and digitalized services, which in turn has increased demand for internet services and digital infrastructure. This provided opportunities for the services sector establishments to expand and grow.

Establishments operating in administrative activities and support services also experienced remarkable growth, with approximately 109.1% between 2010 and 2020. This service sector can reflect the preference of large organizations to outsource certain tasks and services, such as security, administrative services, cleaning, and others, where this trend is part of efforts to streamline and specialize operations,

leading to an increase in the number of temporary staffing agencies and office support services, for example.

On the other hand, growth in accommodation and food services was moderate (58%) due to intense competition in these activities and the constant entry and exit of companies, despite the dynamism of the tourism and leisure sector in the Netherlands. Meanwhile, the transport and storage sector grew at a rate of 86.1% during the study period, largely driven by e-commerce growth, leading to increased demand for express home delivery services, small shipping services, and related services. Real estate activities, however, are known to be the slowest growing and have the smallest market share among service establishments in the Netherlands, due to the general dominance of large companies in this sector.

This structure demonstrates that the Dutch economy is moving rapidly and steadily towards innovation, knowledge, and digitalization, with e-commerce playing an increasingly vital role in the growth of the transport and warehousing sector and the need for flexible supply chains. Consequently, the Dutch economy is not only experiencing an increase in the number of service providers but also a radical transformation in their quality, as technical and knowledge-based services become a key driver of the economy. These results are consistent with Wache et al. (2024) and Bilderbeek and Hertog (1998), who indicated the increasing role of professional, knowledge-intensive, and technology-based business services in the Dutch case.

The Netherlands has been gradually shifting from manufacturing to services; for example, since 2000, the share of manufacturing activities in total income within global goods value chains has declined significantly, while the share of professional services, such as marketing, legal, and others, has risen considerably. The study by Wache et al. (2024) found that, since 2018, professional services have been one of the largest contributors to total income, accounting for 27%, while administrative, organizational, and engineering activities have remained relatively stable. The role of non-manufacturing sectors in value chains has also increased, driven by service activities such as trade, information, and communications. Technology-based knowledge-intensive business services (T-KIBS), including information technology, engineering, and architectural services, have played a significant role in this evolution, serving as a key driver of innovation and knowledge transfer while connecting service providers to various industries. This, in turn, boosts the nation's economic competitiveness (Bilderbeek and Hertog, 1998).

In this context, the Dutch case reflects a more advanced structural shift, where digital and knowledge-intensive services play a dominant role compared to traditional service activities, highlighting the importance of a higher level of integration in global value chains.

After clarifying the overall economic performance of the services sector in the Dutch economy, it is necessary to examine the economic performance of the activities and sub-sectors within this sector, after presenting their respective shares, thus highlighting their contribution to economic performance. The following analysis presents the economic indicators for each major services sector.



**Figure 5.** Evolution of production value and turnover by sub-sectors of Dutch services  
 Source: Prepared based on (Eurostat, 2024)

Note: Data for 2017 are treated as missing because they are not available

The preceding figures illustrate that both professional, scientific, and technical activities, as well as transport and storage activities, are fundamental to the service economy in the Netherlands and are active components of the overall economic structure. This is reflected in their ranking first and second, respectively, in terms of turnover and production value among all service activities in the country. The turnover and production value of professional, scientific, and technical activities exceeded €90-100 billion by the end of the study period, reflecting their pivotal role as high-value, knowledge- and technology-related services. Meanwhile, in 2020, the turnover and production value of transport and storage activities reached €87 billion and €65 billion, respectively, reflecting their strategic role in the Dutch economy, stemming from the country’s geographical location as a global trade gateway.

These findings confirm the findings of Wache et al. (2024) noted the Netherlands’ remarkable specialization in professional services, surpassing countries with similar specializations, such as the Scandinavian countries and the European Union average. They also extend the evidence by highlighting that the Dutch specialization is observed in its services sector’s turnover and production value, not just its position within value chains. Therefore, the Netherlands’ distinctive position is relatively based on two pillars that reflect its role as a business hub in Europe: knowledge-intensive professional services and logistics.

The information and communications technology (ICT) sector is a rapidly growing activity, with both its turnover and production value increasing steadily, reflecting, as previously explained, the economic shift towards digitalization and technology, and has also strengthened the Netherlands' position as a leader in digital infrastructure in Europe. Although these activities are relatively new, they have become a fundamental pillar of the Dutch services sector, highlighting the Dutch focus on digital innovation and knowledge-intensive services.

In contrast, administrative and support activities are considered more supportive than a primary driver, contributing less than the aforementioned activities to the economy, despite their turnover and production value sometimes exceeding €90 billion. On the other hand, the contribution of real estate activities to the economy remains relatively stable, ranging from €23 billion to €31 billion in both turnover and production value. This is attributed to the sector's ability to maintain stable production levels and its lower vulnerability to fluctuations compared to other sectors.

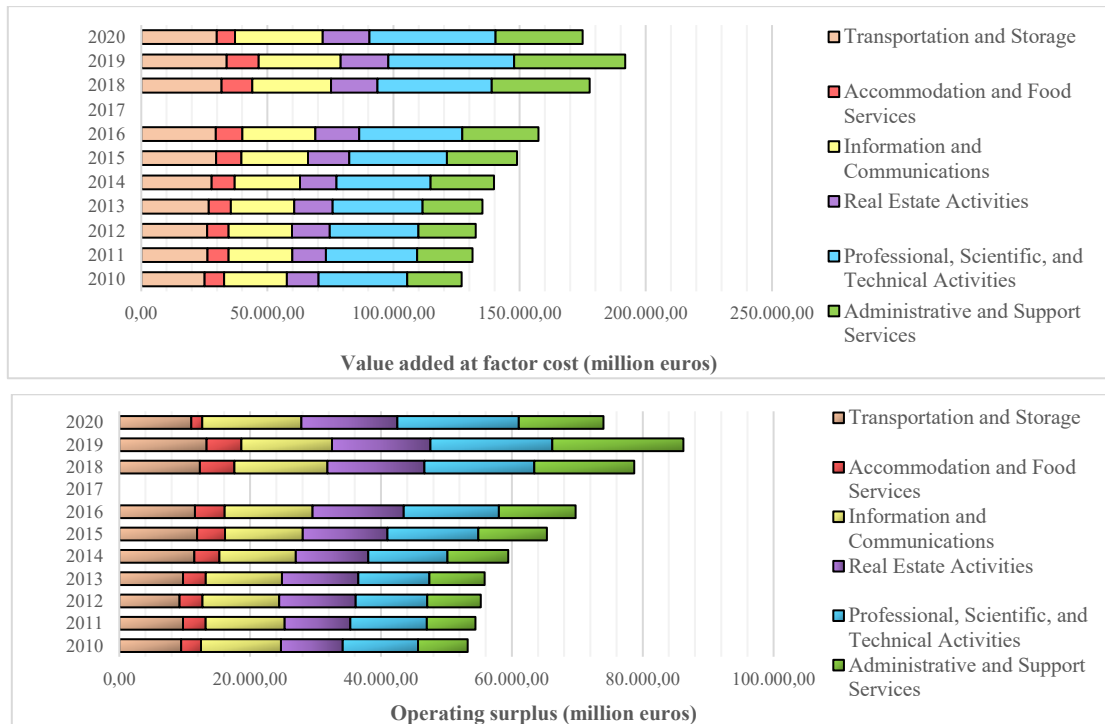
The accommodation and food services sectors are experiencing rapid and sustained growth, despite being the smallest among service activities in terms of financial value. This is due to their close link with tourism and domestic consumption; as they continue to expand, those two activities have become of great economic and social importance in the Netherlands. However, their high vulnerability to market fluctuations remains a key restriction.

The COVID-19 crisis had varying impacts on service sectors in the Netherlands, depending on their nature. Accommodation, food services, transportation, and storage were the hardest hit, due to the disruption of the retail sector and the closure of the tourism and travel industry, including hotels, restaurants, and related services. Meanwhile, information and communication activities maintained relatively high levels of activity and revenue, due to their reliance on digital services, which saw increased demand during the pandemic. This trend reveals a relative resilience in professional, scientific, and technical activities despite the overall economic downturn. The real estate sector was also affected by the pandemic, experiencing a significant decline in turnover and production value, although this impact was less severe than that on the consumer-oriented sectors.

In terms of weight and contribution to the economy, the preceding results highlight that professional, scientific, and technical activities, administrative and support services, and transport and storage services collectively represent some of the largest shares of the service sector in the Netherlands, exceeding 67% (22-23% each), making them a central pillar of the country's service economy. Following these activities is the information and communication sector, with a share of 19%, a significant percentage that underscores this sector's size and importance compared to other sectors.

All these observations demonstrate that the service sector in the Netherlands is primarily geared towards business-to-business services (B2B), with the logistics sector being the largest contributor and most influential in the country's service economy, compared to consumer sectors such as restaurants and hotels. This structure demonstrates that business services in the Dutch economy are key intermediate inputs that supports its competitiveness and integration into global supply chains. This aligns with the findings of Beverelli et al. (2017), Shen and Liu (2024), and Yu et al. (2021) who identified that business services, information and communication technology, and transport and logistics services all represent strategic intermediate inputs that effectively contribute to supporting productivity and enhancing coordination among supply chains.

The preceding indicators measure the activity of the sub-sectors of services and their market transactions, while understanding their true economic contribution and their role in generating profitability requires other indicators, such as value added and operating surplus, which highlight their contribution to GDP and their ability to generate income and profits, as shown below.



**Figure 6.** Evolution of value added and operating surplus by sub-sectors of Dutch services  
 Source: Prepared based on (Eurostat, 2024)

Note: Data for 2017 are treated as missing because they are not available

Figure 6s shows that professional, scientific, and technical activities accounted for approximately a quarter (26%) of the total value added in the services sector at the end of the study period, amounting to nearly €50 billion. These activities consistently outperformed other sub-service sectors throughout this period, indicating their fundamental role in generating added value. Administrative and support services followed, with a value of approximately 23% (€34.5 billion), reflecting the trend towards outsourcing non-core services. The value added of information, communication, transport, and storage services ranged from €25 to €35 billion, further highlighting their crucial importance to the economy. Accommodation and food services had the lowest value added in the Dutch services sector, despite their dynamism due to their connection to the country’s thriving tourism and leisure industry.

This situation continued in subsequent years; in 2023, the combined contribution of trade, transport, hospitality, communications, finance, real estate, and business services to the Dutch economy amounted to approximately 54% of the added value. In contrast, non-commercial services in the public sector, education and healthcare, along with relatively small service sectors such as culture and entertainment, accounted for 23% of the total value added in 2023 (CBS, 2024).

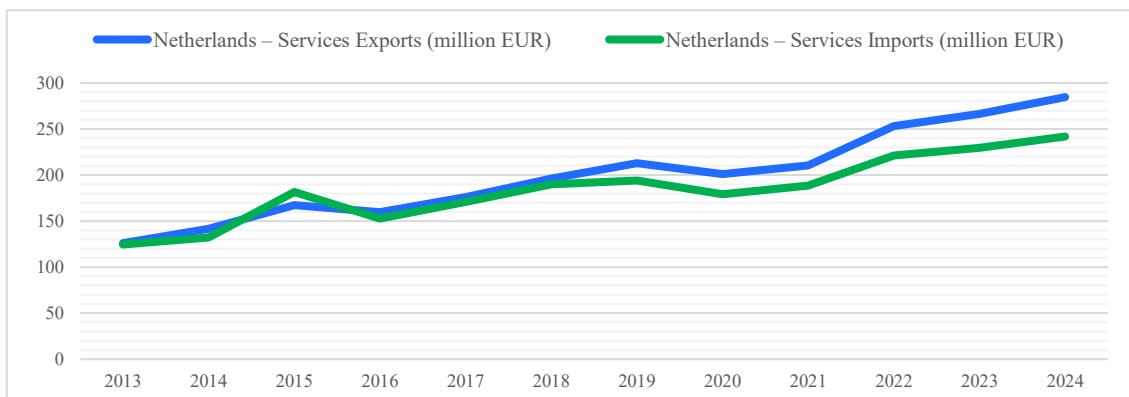
In terms of profitability, the ICT sector was the most profitable in the Netherlands from 2010 to 2016, consistently leading in operating surplus. After 2017, this ranking underwent a clear change, as the administrative and support services sector began to surpass the profitability of the ICT sector, by a small margin in 2018, and then by a larger margin since 2019, becoming one of the leading sectors during these years with the professional, scientific, and technical activities, which is commensurate with this sector’s considerable size. However, the specific circumstances of the global COVID-19 health crisis, which negatively affected many service sectors, proved beneficial for the ICT sector, which regained its leading position in 2020 in terms of operating surplus.

Based on the aforementioned indicators - turnover, production value, added value, and operating surplus - a clear difference emerges among sub-sectors of the services in the Netherlands in terms of their contribution and weight in the economy. Professional, scientific, and technical activities constitute the highest sub-sector in terms of added value and production value, along with a significant capacity to convert their economic activity into income, reflecting its relatively high efficiency. In contrast, accommodation and food services contribute the least to the economy in terms of added value and operating surplus, thus diminishing their economic efficiency despite their social and economic importance to the country. The variations in those values illustrate the disparity in productivity and profitability among the service sub-sectors in the Netherlands. This analysis addresses *H2* by highlighting differences in efficiency across service sub-sectors in the Netherlands.

#### 4.2. The Contribution of the Services Sector to the Dutch Foreign Trade

The services sector in the Netherlands plays a central role in its foreign trade with a remarkable contribution in the international services trade. Openness to international markets and excellence in key sectors have helped it achieve this superiority.

Service imports represent a significant share of the Netherlands' trade, as the country imports a variety of services to meet domestic market needs, including those that support economic activities. Service exports are also a vital part of the Dutch economy and a key component of its trade, reflecting growth and the country's position in international trade. The evolution is shown in the figure 7 below.



**Figure 7.** Evolution of Service Imports and Exports in the Netherlands, 2013-2024  
Source: Prepared based on (Eurostat, 2026)

Figure 7 highlights the long-term upward trend of Dutch service imports, characterized by significant and sustained growth, despite some occasional fluctuations in certain years. Its total value increased from €124.6 billion in 2013 to €241.8 billion in 2024. It should be noted that a decline was recorded in 2016 and 2020, which may be attributed to the impact of the economic cycle, and the COVID-19 crisis in 2020, with the recovery of the import trend observed after each recorded decline.

Service exports in the Netherlands generally followed an upward trend during the study period, with some minor fluctuations, except for a decline in 2019-2020 due to the COVID-19 pandemic. Overall, however, these exports experienced a significant surge, more than doubling (over 125%), reaching a value of €284.6 billion in 2024, compared to approximately €126.1 billion in 2013. This highlights the dynamism of service sector exports and their high sensitivity to external fluctuations. This sensitivity is evident in the decline experienced in 2016, 2020 in line with imports, indicating the remarkable impact of the global economy and trade on these transactions.

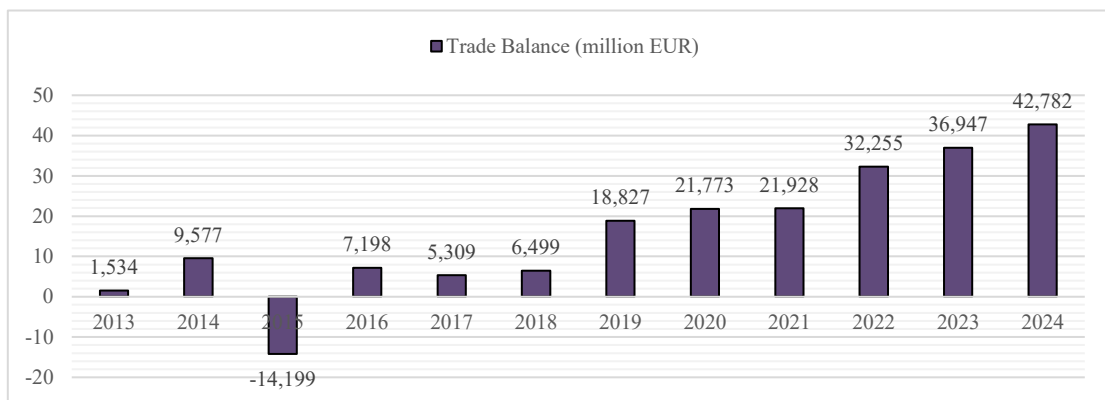
These trends, however, retain the specificities of the sectors and activities associated with it. For example, a continuous upward trend was recorded since 2015 in net Dutch service exports, driven mainly by manufacturing, communications, and transport services, while net imports of travel services experienced a decline during this period (European Union, 2024).

From that, it appears that both service exports and imports in the Netherlands follow a similar growth trajectory, indicating long-term, gradual growth. At the same time, service exports have demonstrated greater dynamism and resilience to crises compared to service imports. This growth in both service exports and imports reflects the country’s high level of trade openness, one of the highest globally, which has been facilitated since the beginning of the millennium by the growth of global trade and advancements in transport and communication technologies (OECD, 2025).

Those findings are also consistent with an OECD (2025) report, which addressed the growing importance of services trade in the Netherlands, where the contribution of services exports to GDP more than doubled from 7% in 1995 to 14% in 2022. This indicates a sustained and significant increase in service exports over time, confirming the growing role of services in the Dutch economy.

These results may be explained by the nature of the Dutch economy, which relies heavily on imported intermediate services such as business services, information technology services, logistics, and others to support domestic production. This pattern explains some of the fluctuations recorded in the Dutch service imports in certain years of the study, as they are linked to the productive sector and, consequently, to fluctuations in economic activity, both domestically and globally. Therefore, this pattern suggests that the increase in service imports in the Netherlands is more closely linked to the structural needs of the economy than to potentially temporary consumer demand. These observations are consistent with Shieh (2020), the OECD (2024), and the WTO and World Bank (2023), highlighting that trade in intermediate and business services in advanced economies is an important source of their specialization and international competitiveness. The Dutch case also indicates a reliance on intermediate services as a structural component of its economy, reflecting its deeper integration into global production and trade networks.

Based on the difference between these service exports and imports, the services trade balance emerges, which is one of the indicators that demonstrates the Netherlands’ position in international trade, as discussed below.



**Figure 8.** Evolution of the Netherlands’ Services Trade Balance

Source: Prepared based on (Eurostat, 2026)

As shown in Figure 8, the Dutch services trade balance has maintained a persistent structural trade surplus throughout most of the study period, with service exports consistently exceeding service imports. This observation indicates a long-term upward growth trend, not just a temporary surplus.

The results also reflect a shift from fragility to structural strength. The services trade balance fluctuated between 2014 and 2018, with a deficit of €-14.199 billion in 2015, likely due to high domestic demand for foreign services that continued to threaten the Netherlands' ability to export services during this period, increasing its competitive vulnerability. Since 2019, this balance has recorded a gradual increase in surplus, marking a turning point in the balance with an €18.827 billion surplus. A surplus is also noted during the COVID-19 crisis, with €21.773 billion in 2020, despite its disruptions to the global economy and trade and the accompanying negative expectations, indicating the relative resilience of service exports in the Netherlands and the country's integration into international services networks. These findings are in accordance with the study by Tajoli et al. (2021) that discussed the crucial role a country's location and degree of integration within international services trade networks play in shaping its performance in global trade.

The Dutch services trade balance maintained this surplus in the years following the crisis, with an increase from €1.534 billion in 2013 to €42.782 billion in 2024, representing an important growth of 2779%. This significant and sustained trade surplus in the Netherlands reflects dynamic export activity and high competitiveness, even during periods of economic slowdown. This can be attributed to its strong global position as a hub for multinational corporations and their subsidiaries, as well as a centre for transport and logistics (OECD, 2025).

The above demonstrates that the Netherlands is heavily reliant on international trade, making its economy vulnerable to global volatility, geopolitical fragmentation, and supply chain disruptions. The fragility of this economy became particularly evident during the COVID-19 pandemic and the Russia-Ukraine conflict. It is also vulnerable to weak external demand as a result of heightened trade policy uncertainties since 2015 stemming from geopolitical fragmentation, shifting trade alliances, and rising protectionism. These supply chain disruptions pose a concern for digital infrastructure components whose production is concentrated in specific geographic regions, while global demand for them continues to grow (OECD, 2025).

The preceding findings regarding imports, exports, and the trade balance of the services sector in the Netherlands are consistent with hypothesis H3: *The services sector in the Netherlands is associated with its foreign trade.*

To better contextualize the previous results, it is advisable to compare the Netherlands with other countries, specifically by placing it within the European context, where data relating to the service sector highlights its weight in the economy and trade of both the Netherlands and the European Union, as follows:

**Table 1.** Netherlands' Share in the EU Services value added at factor cost

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
(%)	-	6.67	6.69	6.66	6.65	6.79	6.87	-	7.07	7.32	6.95

Source: Prepared based on (Eurostat, 2024)

Table 1 indicates a relatively stable share of Dutch services value added at factor cost in the EU total, with a proportion between 6.6% and 7.3% during the study period. This relative stability of its share reflects the ability of the Dutch services sector to maintain its position and standing within the European economy, without experiencing major fluctuations.

Furthermore, the Netherlands achieved service sector growth between 2015 and 2019 that was relatively higher than the EU average. However, the Netherlands was more significantly impacted by the COVID-

19 pandemic than the EU as a whole, with the services sector’s share of total EU services value added declining to 6.95% in 2020.

**Table 2.** Netherlands’ Share in the EU Services Trade

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Exports Share (%)</b>	9.52	9.91	10.60	9.72	9.83	10.29	10.29	11.06	9.87	9.53	9.54	9.48
<b>Imports Share (%)</b>	10.57	10.39	12.44	10.05	10.48	11.09	10.05	10.42	9.98	9.42	9.18	9.12

Source: Prepared based on (Eurostat, 2026)

The results in Table 2 show that the Netherlands maintained a relatively stable contribution to EU services trade throughout the study period, despite some minor fluctuations, indicating its significant role in this trade. Its share of EU services exports ranged between 9.50% and 11.10%, while its share of EU services imports ranged between 9.10% and 12.40%.

Comparing service exports and imports, the share of service imports slightly exceeded that of exports, peaking in 2015 at 12.44%, reflecting the Netherlands’ strong integration into the EU services market, with a significant reliance on both exporting and importing services. During the COVID-19 pandemic, specifically in 2020, the Netherlands recorded a significant increase in its share of service exports (11.06%), contrary to expectations of an economic recession at that time. This may suggest structural advantages or resilience within the Dutch service sub-sectors during that period. However, these exports and imports declined after 2020, reaching levels around 9-9.50% by 2024.

The relative stability of the Netherlands’ share of EU services sector value added, exports, and imports reflects both its important contribution as a country in the European services economy and the competitiveness of its services sector in international markets.

### 4.3. Statistical assessment of the hypotheses

As explained in the Methodology section, the descriptive analysis is enhanced by simple tests, including correlation, simple linear and multiple regression models, based on selected indicators such as services value added (measured at factor cost as shown before), GDP, service exports and service imports (measured in current prices). This is done to explore the relationship between the expansion of the services sector in the Netherlands and its overall economic performance.

The correlation analysis is conducted using the commonly available years for the four indicators (2013-2016 and 2018-2020) on the Eurostat database; results are shown in the following table 3.

**Table 3.** Correlation matrix of service-related indicators and GDP in the Netherlands

Variable	GDP	Services Value Added	Services Exports	Services Imports
<b>GDP</b>	1.000	0.977	0.969	0.825
<b>Services Value Added</b>	0.977	1.000	0.970	0.859
<b>Services Exports</b>	0.969	0.970	1.000	0.933
<b>Services Imports</b>	0.825	0.859	0.933	1.000

Source: Prepared based on (Eurostat, 2024), (Eurostat, 2026)

Table 3 shows a strong positive correlation between the expansion of the services sector in the Netherlands and key macroeconomic indicators. The value added of services is very strongly correlated with GDP (0.977), indicating that the growth of this sector is closely associated with the country’s economic performance. Furthermore, Dutch service exports are highly correlated with both service value added and GDP (0.970 and 0.969, respectively); the service imports are also highly correlated with GDP (0.825) and value added (0.859). In addition, the correlation value (0.933) indicates a very strong and close relationship between exports and imports in the Dutch services sector, underscoring the important role of services within the structure of the Netherlands’ foreign trade.

This pattern indicates that the services sector is closely linked to production and trade indicators, and that there is significant integration between exports and imports in this sector. This highlights that the Netherlands possesses a sophisticated and interconnected trade structure within the services sector, and that the latter contributes meaningfully to its economic activity. In addition, the relationship between the services sector and economic performance is examined using a simple linear regression model, with GDP as the dependent variable and services value added as the independent variable.

According to Table 4, the relationship between service value added and GDP in the Netherlands is statistically significant with p-value < 0.001. This relationship is relatively strong, where the value of the regression coefficient reached 3.120, which means that a one-unit increase in services value added is associated with an increase in GDP by 3.12 units. At the same time, the model explains a large proportion of the variation in GDP ( $R^2 = 0.955$ ), which indicates a relatively strong association between the services sector and overall economic performance.

**Table 4.** Simple Linear Regression Results between GDP and services value added

Variable	Coefficient	t-statistic	p-value
Constant (GDP)	240580.5	4.899	0.0045
Services Value Added	3.120	10.295	0.00015
R-squared	0.955	-	-

Source: Prepared based on (Eurostat, 2024), (Eurostat, 2026)

Previous empirical results, including correlation and simple regression, are consistent with H1, which suggests the important role of the services sector in Dutch economic performance.

They also support the descriptive findings and are consistent with previous studies linking the growth of the services sector to economic performance in advanced economies. Even so, this link in the Dutch case should be interpreted as a sign of structural interdependence rather than causation, as services added-value, services exports, services imports, and GDP evolved together. Additionally, the relationship between the services sector and foreign trade is examined using simple regression models between services value added and external trade indicators: services exports and imports.

**Table 5.** Simple Linear Regression Results between services value added and services exports

Variable	Coefficient	t-statistic	p-value
Constant (services exports)	- 66528.1	- 2.464	0.057
Services Value Added	1.484	8.904	0.0003
R-squared	0.941	-	-

Source: Prepared based on (Eurostat, 2024), (Eurostat, 2026)

Table 5 shows that the relationship between services value added and Dutch services exports is statistically significant with a p-value < 0.001. This relationship is positive, with the regression coefficient value reaching 1.484, which means that a one-unit increase in services value added is associated with an increase in services exports by 1.484 units. The model also explains a large proportion of the variation in services exports ( $R^2 = 0.941$ ), which reflects the strong relationship between the services sector and external trade.

**Table 6.** Simple Linear Regression Results between services value added and services imports.

Variable	Coefficient	t-statistic	p-value
Constant (services imports)	- 19870.2	- 0.401	0.705
Services Value Added	1.148	3.760	0.013
R-squared	0.739	-	--

Source: Prepared based on (Eurostat, 2024), (Eurostat, 2026)

Table 6 shows a statistically significant and positive relationship between services value added and services imports, with a p-value < 0.05 ( $p = 0.013$ ) and a regression coefficient value of 1.148. This means that an increase of one-unit in services value added is associated with an increase of 1.148 units in services imports. The R-squared value, reaching 0.739, indicates that 73.9% of the variation in services imports is explained by this model, indicating a relatively strong relationship between the services sector and services imports.

Based on these results, the simple regression analysis between services value added and both services exports and services imports provide indicative support for H3, suggesting that the services sector in the Netherlands is associated with its foreign trade.

Meanwhile, H2 is examined through the comparative descriptive analysis presented in the previous sections, showing differences between service sub-sectors and their contributions to the Dutch economy. For a more comprehensive empirical analysis, the study explores the effect of services-related indicators on economic performance using a multiple regression model.

**Table 7.** Multiple Regression Results between GDP and service-related indicators

Variable	Coefficient	t-statistic	p-value
Constant (GDP)	386509.8	6.519	0.0073
Services Value Added	0.748	0.804	0.480
Services Exports	2.568	2.981	0.059
Services Imports	- 1.253	- 2.665	0.076
R-squared	0.989	-	-

Source: Prepared based on (Eurostat, 2024), (Eurostat, 2026)

Table 7 shows that this model explains a large proportion of the variation in GDP ( $R^2 = 0.989$ ), indicating that the model has relatively high explanatory power. However, statistical significance varies among individual coefficients, and the results should be interpreted with caution due to the limited sample size, as follows:

Despite its positive coefficient (0.748), the value added of services is not statistically significant ( $p > 0.1$ ), reflecting the lack of clarity regarding its individual effect when other variables are present in the model. Services exports are statistically significant ( $p < 0.1$ ), albeit marginally ( $p = 0.059$ ), with a positive coefficient (2.568), suggesting a possible positive association with GDP.

Services imports are also marginally statistically significant ( $p = 0.076$ ;  $p < 0.1$ ), however, they have a negative coefficient (- 1.253), indicating a possible inverse relationship with economic performance. These results may suggest potential multicollinearity between the explanatory variables, which could influence the statistical significance of individual coefficients.

The previous results showed high bidirectional correlations between the explanatory variables. Therefore, table 8. shows the results of calculating the Variance Inflation Factor (VIF) according to the following relationship:  $VIF = 1 / (1 - R^2)$

**Table 8.** VIF results

<b>Variable</b>	<b>VIF</b>
<b>Services Value Added</b>	22.85
<b>Services Exports</b>	45.85
<b>Services Imports</b>	10.41

Source: Author's calculation (2025)

All VIF values shown in Table 8 are greater than 10, reflecting a strong multicollinearity between the explanatory variables. Accordingly, a strong correlation is observed between the value added of services, service exports, and service imports, which is reflected in the inflation of standard errors and the decrease in the statistical significance of individual coefficients in the multiple regression model.

Therefore, it is important to note that multiple regression results should not be interpreted as strong evidence of independent effects of each variable, but rather as exploratory and diagnostic findings.

Regarding H1, multiple regression analysis offers a more comprehensive interpretation. By including both service exports and imports in the model, the coefficient of services value-added becomes statistically insignificant. This analysis reveals the difficulty of isolating the individual contributions of highly correlated service sector indicators within a small sample size and does not necessarily indicate a lack of relationship between the service sector and economic performance.

The results also suggest that foreign trade in services, especially service exports, is linked to the economic performance of the Netherlands.

## **5. Limitations**

This study has several limitations, the first being the absence of 2017 data related to the services sector in the Netherlands from the selected database (Eurostat), which may affect the consistency of the trend. At the same time, the statistical analysis relies on a small sample comprising a limited number of annual observations, which may influence the interpretation of the results, as they should be interpreted as indicative rather than conclusive. This is because the limited sample size affects the robustness of the statistical inference, with the possibility of inflated correlation and regression coefficients.

## **6. Conclusion**

According to the analysis provided in this study, it is evident that the services sector in the Netherlands has undergone significant structural growth, with the count of service establishments more than doubling within a span of just ten years. This sector demonstrates a consistent rise in value creation and operating surplus, implying a relatively high level of profitability and efficiency in the economy, along with a degree of resilience during crises. Professional, scientific, and technical activities, as well as information

and communication technologies, are vital elements of the Dutch economy, closely linked to the shift towards a knowledge-based and digital economy.

Concurrently, the Netherlands possesses relative strength and competitive advantage in the services trade, particularly in intermediate exports of financial, technological, and logistical services, supporting its position in the international services trade. The services trade balance has shown a growing structural surplus, especially since 2019, highlighting the country's relative strength in service exports compared to its service imports, even during periods of crisis.

These results show that the services sector forms an important part of the Dutch economy and they provide a reference framework for identifying the most dynamic and influential service sectors in the economy. Those findings highlight the importance of investing in digital and knowledge-based services, diversifying the service base, reduce over-reliance on sensitive and crisis-prone sectors such as tourism and transportation, and supporting the development of digital and logistical infrastructure to sustain the Netherlands' competitive advantage in intermediate services trade.

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## **Sektor usluga u nizozemskom gospodarstvu: ekonomski doprinos i rezultati vanjske trgovine**

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**Sažetak:** Ovaj rad ima za cilj prikazati strukturnu dinamiku i doprinos uslužnog sektora nizozemskom gospodarstvu, kao jednom od gospodarstava država članica Europske unije koje predstavlja vodeći model gospodarstva temeljenog na uslugama. Za analizu službenih statističkih podataka Eurostata o uslužnom sektoru za razdoblje 2010.–2020. korišten je deskriptivno-analitički pristup, dok podaci o trgovini uslugama obuhvaćaju razdoblje do 2024. godine. Rezultati pokazuju da uslužni sektor ima ključnu ulogu u nizozemskom gospodarstvu te značajno doprinosi stvaranju dodane vrijednosti, profitabilnosti i vanjskoj trgovini, uključujući izvoz i uvoz. Unatoč svojoj fleksibilnosti i raznolikosti, uslužni sektor i dalje je osjetljiv na globalne poremećaje i gospodarska kretanja, što naglašava potrebu za strateškim ulaganjima i odgovarajućom potporom javnih politika radi očuvanja konkurentnosti i dugoročnog rasta. Ograničenja istraživanja odnose se na nedostatak podataka za uslužni sektor za 2017. godinu te na mali uzorak korišten u regresijskim modelima. Doprinos studije ogleda se u pružanju kvantitativne analize koja nadopunjuje prethodna kvalitativna istraživanja te dodatno rasvjetljava ulogu uslužnog sektora u nizozemskom gospodarstvu i međunarodnoj trgovini. Za buduća istraživanja preporučuje se provedba sveobuhvatnijih analiza koje bi obuhvatile širi skup podataka i dulje vremensko razdoblje, uključujući proučavanje utjecaja globalnih čimbenika na uslužni sektor u Nizozemskoj ili usporedbu s odabranim zemljama.

**Ključne riječi:** Uslužni sektor; uslužno gospodarstvo; trgovina uslugama; gospodarska konkurentnost; Nizozemska

**JEL klasifikacija:** F14; L80; O52