Building a Future-Proof EdTech Ecosystem

Insights and Strategies for Scaling Evidence-Based Innovation in Dutch K-12

Erasmus Centre for Entrepreneurship

NOLAI
NATIONAAL ONDERWIJSLAB AI

Table of Contents

Glossary of abbreviations & key terms

K-12 / funderend onderwijs - Compulsory education from primary through secondary level in the Netherlands (PE, VE and specialised education).

PE - primair onderwijs - Primary education (ages 4–12).

VE - voortgezet onderwijs - Secondary education (ages 12–18).

SE / SBE - (speciaal) basisonderwijs - Special and/or remedial primary education for pupils needing additional support.

HE - hoger onderwijs / higher education - Universities and universities of applied sciences.

EdTech - education technology - Digital tools, platforms and services designed specifically for teaching, learning and education management.

AI - artificial intelligence - Data-driven systems (including machine learning and generative AI) used to support or automate parts of teaching, learning or school operations.

ICT - informatie- en communicatietechnologie - Information and communication technology; here mainly school IT infrastructure and services.

Organisations and programmes (Netherlands)

ACM - Autoriteit Consument & Markt - Authority for Consumers & Markets; the national competition and market regulator.

DUO - Dienst Uitvoering - Onderwijs Executive agency that manages national education data, funding and student finance.

OCW - Ministerie van Onderwijs, Cultuur en Wetenschap - Ministry of Education, Culture and Science.

PE-Raad / VE-raad - National sector councils representing PE and VE school boards.

Kennisnet - Public organisation that supports Dutch education with knowledge, standards and infrastructure for digitalisation.

SIVON - Cooperative of school boards that procures ICT collectively and negotiates contracts and data agreements with vendors.

SURF - Cooperative ICT organisation for higher education and research.

Edu-V - National public–private standards initiative to improve interoperability and secure data exchange between digital learning tools and school systems.

Entree Federatie - National identity and single sign-on federation that lets pupils and teachers access multiple education services with one account.

NOLAI - Nationaal Onderwijs Lab AI - National Education Lab AI, a publicly funded programme focused on co-developing and researching AI applications for primary and secondary education.

Npuls - Digitaliseringsimpuls Onderwijs - National Growth Fund programme to accelerate digital transformation in higher and secondary vocational education.

Nationaal Groeifonds (NGF) - National Growth Fund that finances large-scale innovation and infrastructure projects, including education and digitalisation.

ROM - Regionale Ontwikkelingsmaatschappij - Regional development agency that supports innovation and entrepreneurship (including some EdTech) at regional level.

Dutch EdTech Foundation - Independent community organisation that connects Dutch EdTech companies, investors and education partners through networking, research and events.

Medezeggenschapsraad (MR) - Participation council in Dutch schools, consisting of staff, parents and/or students, with formal rights to advise on or approve key school decisions.

PLC - Professional learning community - Group of educators who regularly collaborate to improve teaching and learning, often used as a context for piloting or reflecting on new tools.

Systems, technology and data

DPA - Data Processing Agreement - Contract between a data controller (e.g. a school or school board) and a data processor (e.g. an EdTech provider) that sets out how personal data will be processed in line with GDPR requirements

SIS - Student Information System - Core administrative system for pupil data, enrolment, grades and attendance.

LAS / LVS - Leerlingadministratie- / volgsysteem - Student administration and/or monitoring system used to track pupil progress and results.

LMS - Learning Management System - Platform for distributing assignments, managing classes and tracking learning activity (often called ELO in Dutch schools).

ELO - Elektronische leeromgeving - Digital learning environment/platform where teachers share materials and students work on tasks.

SSO - Single Sign-on - Mechanism that allows users to log in once and access multiple applications.

PPPs - Public-Private Partnerships - Collaborations where public organisations (e.g. schools, ministries) and private parties (e.g. EdTech companies) jointly develop or test solutions.

Finance, investment and governance

VC - Venture Capital - Private investment funds that finance startups and scaleups.

LOI - Letter of Intent - Non-binding pre-contract document outlining the main terms of a future investment or partnership agreement.

EIC - European Innovation Council - EU body that funds and supports high-risk, high-impact innovation (e.g. via the EIC Accelerator).

EIB / EIF - European Investment Bank / European Investment Fund - EU institutions that provide finance and guarantees, including programmes for tech and growth capital.

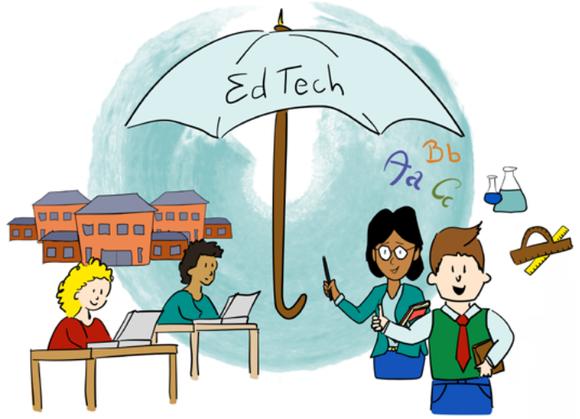
EU - European Union - Political and economic union of 27 member states; sets many of the regulatory frameworks relevant for EdTech (e.g. procurement, data, AI).

Introduction

The landscape of contemporary education is changing, yet not uniformly or at the same pace across contexts. Globally, technological advances and evolving pedagogies are expanding what is possible in teaching and learning. In the Dutch K-12 context, however, change is deliberately incremental: schools introduce technology cautiously, pedagogical shifts are carefully evaluated, and there is an active public debate about the appropriate role of technology in education. In this environment, EdTech remains an umbrella spanning digital learning tools, AI-enabled platforms, and new models of teaching and learning, but its uptake depends on alignment with pedagogical quality, equity, and trust. EdTech can enhance access, quality, and resilience. Dutch primary and secondary education is under pressure from teacher shortages, workload and rising expectations around digital competence. Schools are experimenting with technology to help address these pressures, but change in Dutch K-12 is careful, incremental, and shaped by public values. At the same time, global vendors and new AI-driven tools are accelerating quickly, creating tension between schools' cautious adoption culture and the pace of technological development. This report focuses primarily on K-12 ('funderend onderwijs') in the Netherlands.

Against this backdrop, the Netherlands continues to host an active EdTech community. Dutch EdTech ventures have shown potential in recent years, securing early-stage investment and building products in areas such as AI-assisted learning and immersive content (Brighteye, 2023; Dutch EdTech Foundation, 2024). At the same time, international benchmarks suggest the country's relative position has not strengthened since earlier perceptions as an emerging hub; recent European landscapes place the Netherlands mid-pack and indicate momentum has shifted elsewhere (HolonIQ, 2025). Persistent challenges underlie these trends. The Dutch EdTech ecosystem remains reliant on early-stage funding, with relatively few companies reaching the growth capital needed for scaling. Long sales cycles, fragmented market channels, and difficulties converting research into sustainable products constrain international competitiveness (Dutch EdTech Foundation, 2024). Compared with larger ecosystems such as the UK or Germany, which have multiple large late-stage rounds and global players, the Netherlands still faces hurdles to achieve scale commensurate with its innovation potential.

These dynamics are now the subject of active public debate, most visibly in the parliamentary discussions on digital learning materials and procurement (Tweede Kamer, 2025). Beyond concerns about the dominance of a few publishers, the bundling of textbooks with digital tools, and rigid procurement rules, the debate also surfaced cross-party worries about the financing of the education supply market and the implications of investor ownership for public value. In parallel, schools, founders, and investors are asking which factors propel the ecosystem forward and which hold it back. Key questions revolve around funding, market access, adoption, and entrepreneurship: how can Dutch EdTech startups secure growth capital, build repeatable sales in PE/VE, and operate internationally; how can foreign EdTech responsibly enter the Dutch system; how can evidence, interoperability, and procurement reform lower frictions; and how can innovation improve teaching and learning rather than driving technology for its own sake?



Recent industry reports highlight both progress and pain points. The State of the Dutch EdTech Ecosystem 2024 underscores a diverse set of actors and rising activity, but also fragmentation and limited alignment among stakeholders. The Brighteye EdTech Funding Report 2023 notes that while European funding has shown resilience, Dutch deals skew toward smaller early-stage rounds, signalling a growth-stage gap and domestic scaling challenges. These analyses suggest that without targeted strategies, the Netherlands may struggle to capture the full value of its innovations and could see promising ventures scale elsewhere. They also emphasise the importance of internationalisation: for Dutch EdTech companies, expanding into nearby markets, and for foreign EdTech firms, participating responsibly in the Dutch market, both as viable paths to scaling.

To address this need, this collaborative research launched by NOLAI in partnership with Erasmus Centre for Entrepreneurship (ECE) brings together complementary strengths. It builds on NOLAI's practical experience in co-developing EdTech prototypes with businesses, educators, and scientists, and on ECE's expertise in entrepreneurial ecosystems. The aim is to generate actionable insights for policy and practice, with a clear emphasis on the entrepreneurial engine of the ecosystem: without successful founders and scale-ups, EdTech will not deliver lasting impact. Specifically, the study maps the Dutch EdTech entrepreneurial ecosystem, assesses its status across critical domains, and identifies bottlenecks and opportunities.

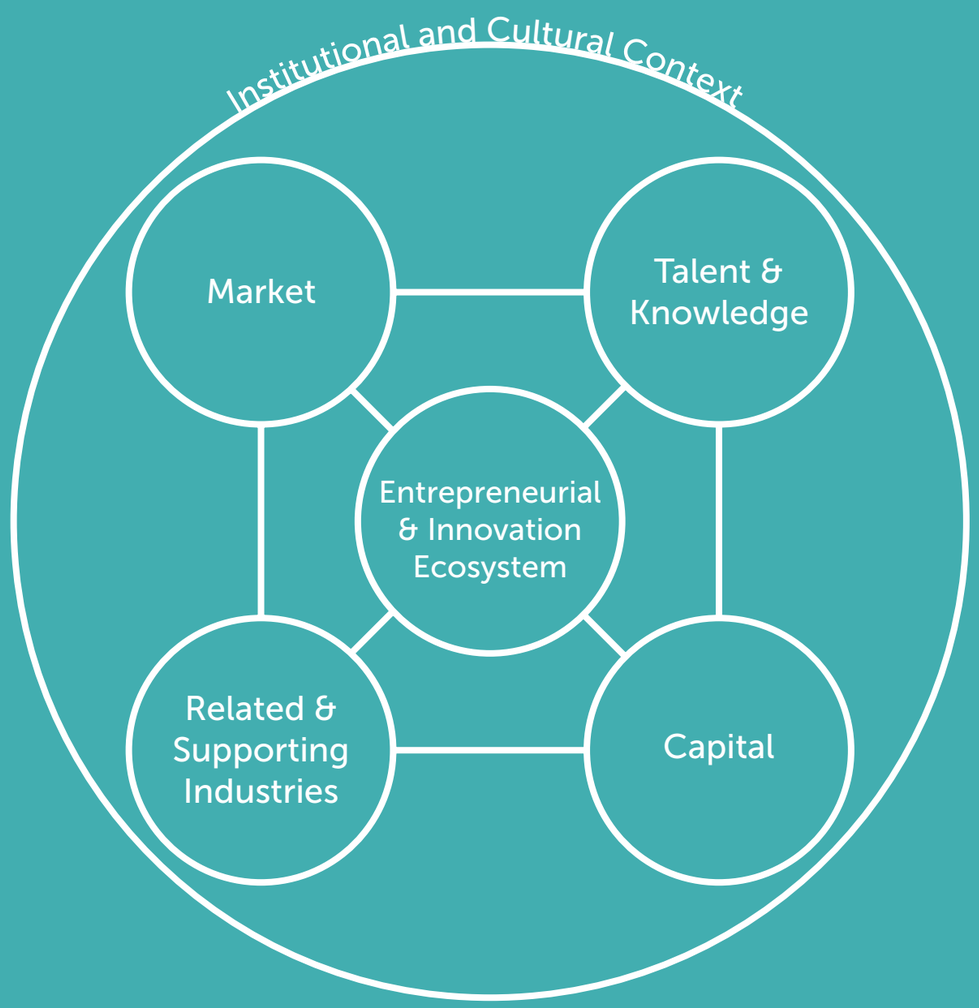
This research addresses the central question:

How can the Dutch EdTech ecosystem, from schools and public agencies to founders, investors, and knowledge institutions, strengthen itself?

To answer this, the research adopts an analytical framework from entrepreneurial ecosystem theory (Isenberg, 2011) encompassing six domains: Capital, Market, Talent & Knowledge, Related & Supporting Industries, Entrepreneurs & Innovators, and Institutional & Cultural Context. We organised our findings accordingly, integrating evidence from literature and reports with insights from Dutch EdTech stakeholder interviews and a stakeholder validation workshop. This approach provides a multi-dimensional view of the ecosystem's structure and dynamics, the barriers to innovation and adoption, and the levers for growth.

In summary, this introduction situates Dutch K-12 EdTech within a cautious policy environment, underscores the centrality of entrepreneurship and a well-functioning market (with government's role focused on ensuring fair competition and public value), and sets out a collaborative, evidence-driven agenda. The following sections present the current status of the ecosystem based on literature and stakeholder input, detailed findings across each domain, and recommendations designed to strengthen collaboration, innovation, and long-term resilience in the Netherlands.

The Dutch EdTech ecosystem structure & key stakeholders



A thriving entrepreneurial ecosystem consists of diverse, interconnected stakeholders. In the Dutch EdTech ecosystem focused on PE and VE, key stakeholders include: EdTech startups and scaleups; educators and educational institutions (schools and school boards); learners and families; investors, incubators, and accelerators; government and public agencies; established education companies (e.g. educational publishers); research institutions and universities; and community organisations or networks. These actors form a multi-faceted network. For example, public-private partnerships (PPPs) link government, K-12 schools, and EdTech firms in pilot programmes, while investor networks connect startups with capital and expertise.

The **State of the Dutch EdTech Ecosystem 2024** illustrates the ecosystem as a network with EdTech startups at the core, surrounded by supporting players such as government, investors, educational institutions, researchers, and community initiatives. The density of interactions among these actors (finance, market demand, human capital, support services, policy, and culture) is critical for a self-sustaining ecosystem (Isenberg, 2011). Fragmentation or misalignment among stakeholders can weaken the ecosystem, whereas strong alignment (e.g. through a shared vision or coordinating entity) can unlock synergies. Notably, current reports highlight a lack of stakeholder alignment in Dutch EdTech: resources are underutilised, and collaboration is fragmented without a central orchestrator. Interviewees indicated the need for a neutral facilitator that can align schools, researchers, and EdTech startups around shared public values. NOLAI is one of several publicly funded initiatives that may contribute to this in AI-related areas, but EdTech more broadly extends beyond AI and will require broader coordination across education, policy, and industry.

Using an established entrepreneurial ecosystem framework (Isenberg, 2011), we organise the findings under six key domains, Capital, Market, Talent & Knowledge, Related & Supporting Industries, Entrepreneurs & Innovators, and Institutional & Cultural Context, integrating evidence from literature and reports and insights from Dutch EdTech stakeholder interviews (entrepreneurs, educators, investors, publishers, and ecosystem experts). For each domain, we discuss the current status and recent trends, identify barriers or challenges, and highlight opportunities to strengthen the ecosystem. Throughout, we remain grounded in the K-12 context and incorporate voices of Dutch EdTech stakeholders, while also noting contrasts with other contexts (e.g. higher education or international markets) when relevant for perspective.

EdTech Ecosystem Map

Institutional & Cultural Context

Governement & Regulatory Bodies

Ministry of Economic Affairs and Climate Policy · Authority for Consumers & Markets · Inspectie van het Onderwijs, Ministerie van Onderwijs, Cultuur en Wetenschap · NRO · Ministerie van Onderwijs, Cultuur en Wetenschap

Sector Councils & Governance Bodies

VO-raad · Kennisnet · PO-raad · SURF · slo · SIVON · Edu-K Coalition

Civil Society & Cultural Influencers

Ouders & Onderwijs · LAKS · Teacher Unions · Network Mediawijsheid · Parent associations & school councils · School Boards & Foundations

Market-Norm Influencers (Tech & Vendors)

cloudwise · Microsoft Education · Google for Education · ParnasSys · LEERLING · cisco · Mobile/Internet Providers

Research & Innovation Platforms

NOLAI Nationaal Onderwijslab AI · European Schoolnet · OECD · Educational Research Institute

Cultural Infrastructure & Events

bett · IPON · Dutch EdTech Meetups and Ecosystem Events · Teacher Training Conference & Networks

Market

End users

- Students (Learner)
- Teachers & Educators
- ICT & Innovation Coordinators within Schools

Education Institutes & Governance

- Primary Schools (PO)
- Municipalities (Local Governement)
- Secondary Schools (VO)
- International School
- School Boards (PO & VO)

Families & Learning Support

- Parents & Family
- Private Tutoring & After-school Programmes

Teacher Advocacy & Professional Bodies

- Algeme Onderwijsbond (AOb)
- Leraren in Actie
- Lerarencollectief

EdTech Content & Platform Providers (Publishers)

Noordhoff · MALMBERG · ThiemeMeulenhoff · zwijsen

Talent & Knowledge

Knowledge Generation & Academic Research

- Universities (Education and Tech department)
- Educational Research Institutes
- Teacher Training College
- MEVW

Ecosystem-Level Networks and Support Platforms

Dutch EdTech · European EdTech Alliance · EdTech Roundtables & Community Events

Practice-Oriented Knowledge Platforms & Labs

Netwerk Mediawijsheid · FUTURE NL · Kennisnet · NL AI Coalition

Talent Pipeline & Digital Skills Initiatives

CoderDojo · CodeWeek · Make IT Work · Startup Talent Pipelines · Education Hackathons or Challenges

Entrepreneurs & Innovators

Startup & Innovation Support

American Corner Groningen · techleap.nl · Erasmus Centre for Entrepreneurship · YES! DELFT · utrechtinc · Impact Hub Amsterdam · Startupbootcamp

Technology & Infrastructure Providers

- School ICT Service Providers
- Learning Management Systems (LMS)
- Hosting and Cloud Infrastructure
- Student Administration System
- Hardware & Device Suppliers

Research & Knowledge Institutions

NOLAI Nationaal Onderwijslab AI · Universities (Education, AI, Tech Departments) · Teacher Training Colleges · Educational Research Insitutes · Knowledge Platforms & Labs

Content & Curriculum Providers

- Educational Publishers
- Education Media & Content Developers
- Adaptive Learning Tool Developers
- Learning Platforms & Portals
- Educational Testing & Assessment Agencies

Distribution & Market Access

- Distribution & Reseller Networks
- Procurement Cooperatives
- Private Education & Training Firms
- Private Tutoring & After-school Programme Providers

Venture Capital Firms

newion · prosus · Brighteye Ventures · EDUCAPITAL · Dff · EMERGE EDUCATION · PEAK · Holland Capital

Impact Investors & Social Funds

rubio impact ventures · Stichting DOEN · Social Finance NL · ABN·AMRO · 4IMPACT · Anton Jurgens Fonds · FNO · NL Funds for Social Enterprises

Public & Semi-Public Capital Providers

- Government Innovation Grants
- Regional Development Funds

Angel Investors and Seed-Stage Support

Rinkelberg Capital · ANTLER · asif ventures

Accelerators & Incubators

Startupbootcamp · YES! DELFT · utrechtinc · Rockstart · Angel Investors (EdTech focused or active in NL)

Related & Supporting Industries

Capital

Capital

Later-stage funding remains a critical weak link in the Dutch EdTech ecosystem. Early-stage capital (e.g. public innovation grants, angel investment, seed venture funding) has become increasingly accessible, but startups struggle to obtain the smart growth capital needed to scale both domestically and internationally.

The **Capital** domain refers to the financial resources and investment conditions that enable EdTech ventures to start, grow, and scale. In the Netherlands, early-stage EdTech companies benefit from a mix of public grants, angel investors, and seed-stage venture capital. At the same time, the market is relatively small and risk-averse, and larger follow-on funding rounds are scarce (Reuters, 2025). The Dutch investment community is still developing deep expertise in education technology, which leads many founders to look abroad for funding and larger markets. As a result, the capital landscape presents both opportunities and constraints: early-stage support, but limited access to the growth capital required to move from pilot projects to sustainable scale (Dutch EdTech Foundation, 2024; Brighteye Ventures, 2025; Dealroom, 2021; Techleap, 2024; Reuters, 2025).

Investment growth and gaps

Access to a diverse mix of venture capital, public funding, philanthropic, and ***"patient"*** capital is essential for experimentation and long-term innovation in EdTech (Isenberg, 2011). In the Netherlands, early-stage conditions have improved markedly in recent years. The number of Dutch EdTech companies grew from about 407 in 2021 to 475 by 2024, and pre-seed/seed funding rounds average around €1.8-2.1 million, broadly in line with European benchmarks (Dutch EdTech Foundation, 2024). However, relatively few Dutch startups manage to secure the larger follow-on investments needed to scale up, and later-stage capital remains a significant bottleneck (Reuters, 2025). In one recent comparison, the Netherlands saw only about $31 million in EdTech funding across 12 deals, whereas France raised roughly $97 million in the same period. This underscores the gap in scaleup funding where the Netherlands ranked 5th in Europe by EdTech funding, trailing larger markets like the UK, France, and Germany. Foreign capital has thus become an important lifeline for scaling; most sizable investments in Dutch tech startups tend to involve international investors (Reuters, 2025).

Interviews with founders and investors help explain why this growth-stage gap persists. Founders describe long deal cycles and fragile term sheets that can fall apart at advanced stages. One founder recounted signing a letter of intent with an investor only for the deal to collapse last-minute, ***"we signed an LOI… and then last minute [the investor] said, 'we're just not going to do it'"*** — an outcome that ***"almost bankrupted us"*** after cash was depleted during an exclusivity period. Several entrepreneurs noted a structural mismatch between typical startup runways and the education sector's timelines: a small EdTech team might have only 6-12 months of runway, whereas selling into K-12 schools can take 12-24 months for the sales cycle to bear fruit. This mismatch forces premature fundraising and can stall growth. Seasonality compounds the problem: missing the school procurement "window" can push revenues out by an entire academic year, strengthening incumbents' positions and raising the capital bar for new challengers.

Compared to sectors like SaaS or HealthTech, K-12 EdTech is still perceived by investors as higher-risk due to the long sales cycles, a modest domestic market size, and the lack of high-profile exits. Many Dutch startups in K-12 and higher education struggle with lengthy lead times and complex tender processes, contributing to a high closure rate in these segments (Dutch EdTech Foundation, 2024). As one founder observed, the country has had ***"relatively few successful exits … and long sales cycles"***, creating a *vicious cycle* that dampens interest from major venture funds. There is also a shortage of specialised EdTech investors in the Netherlands. As one VC interviewee admitted, ***"niet specifiek… edtech investeerder… ik investeer ook in andere technologiebedrijven"***, meaning ***"I'm not specifically an EdTech investor… I also invest in other tech companies."*** This illustrates that many local investors lack a dedicated focus on EdTech, often treating it as just a small part of a broader tech portfolio. Another interviewee noted that numerous Dutch EdTech ventures remain in niches (for example, extracurricular tutoring or test prep), which are seen as easier markets to enter but often lack sustainable revenue streams from school budgets. All these factors contribute to cautious investment behaviour and difficulty raising scaleup capital in the Dutch EdTech scene.

Once they outgrow the seed phase, Dutch founders frequently turn to foreign investors and markets to obtain Series A or B funding. It is common for promising startups to court venture firms in the UK or elsewhere in the EU when looking to raise larger rounds (Dealroom, 2021). An investor in the ecosystem explained that his role as a Dutch funder is often to ***"probeer ik ze verder te helpen" ("try to help them along")***, providing advice and introductions, rather than expecting rapid exits. In other words, local investors who do engage in EdTech tend to adopt a patient, supportive stance – but there are few with sizable capital to deploy. The **reliance on foreign capital can be a double-edged sword**: on one hand it brings valuable expertise, scale experience, and international networks to Dutch EdTech companies; on the other hand, founders must ensure that overseas growth doesn't come at the expense of alignment with Dutch educational needs and values. Experts stress that internationalisation should be seen as a growth path from the Netherlands rather than a diversion away from it. Dutch ventures need access to larger markets to scale, yet they should continue delivering public value at home. Several stakeholders urged companies to learn faster from adjacent markets (so as not to "reinvent the wheel" on problems already solved elsewhere) and to build investor confidence by developing evidence of impact that is internationally relevant.

As one stakeholder summed up candidly during a workshop, "***Funding [for EdTech] is not big***" in the Netherlands. Early-stage support may be improving, but without larger follow-on investments and deeper sector-specific investor expertise, many promising Dutch EdTech ventures risk plateauing or even relocating to achieve their growth ambitions.

Public funding and support

Public funding has begun to play a key role in de-risking EdTech and wider digital innovation in Dutch education. Through the National Growth Fund (Nationaal Groeifonds), the government has made large-scale investments in digital education initiatives such as NOLAI, the National Education Lab AI for primary, secondary and special education, initially awarded €80 million and a further €63 million for upscaling, and Nplus, a €560 million "Digitaliseringsimpuls Onderwijs" programme that supports digital transformation across vocational and higher education (mbo, hbo and wo). These initiatives provide patient capital in the form of grants and innovation funding, helping ventures bridge the notorious *"valley of death"* from idea to product. Unlike traditional venture capital, public funds are explicitly aimed at creating public value (for example, improved student outcomes or reduced teacher workload), which means they can nurture K-12 innovations that might otherwise struggle to attract commercial investors focused purely on financial returns. One founder explained in an interview that a government grant enabled their startup to collaborate with a larger IT partner and keep their platform free for teachers, leading to rapid adoption by over 10,000 teachers nationwide, a level of reach that a small startup could not have achieved on its own in such a short time. This example shows how public support can amplify impact and user adoption in early stages.

However, stakeholders stress that one-off grants must ultimately lead to sustainable business models. Without clear paths to revenue and scale, even a successful pilot project will *"fizzle out"* once the public funding ends. Therefore, robust monitoring and a strong focus on measurable educational outcomes are essential to ensure long-term value and to attract follow-on investment from other sources. In other words, **public capital should be used as a springboard, not a permanent crutch, for EdTech ventures**. As one observer put it, "***grant money should come with an obligation to validate impact and plan for continuity***," otherwise the innovation may not survive beyond the funded period.

Interviewees also emphasised that combining public support with strategic corporate and international co-investment can further reduce risk and accelerate growth. Many Dutch EdTech founders are strongly mission-driven in their company ethos, which makes them attractive to *impact investors* and education-focused corporate partners who share their educational goals. In recent years, established players in the education market, such as publishing houses, student information system (SIS) providers, and assessment companies, have begun investing in or acquiring EdTech startups. These corporate investments bring not only capital but also valuable market access, distribution channels, and credibility in the eyes of schools. Stakeholders pointed out that when a startup secures a government grant, it often acts as a signal to other investors regarding the project's validity and public importance. Such validation can increase investor confidence and crowd in additional funding. One ecosystem expert noted that the European Commission is even exploring ***"cascading grants"*** as more flexible grant models that allow EU-funded programmes to re-grant money to startups in smaller, faster tranches. These cascading funding schemes (currently used in some EU innovation projects) would give startups greater room to experiment compared to traditional large EU grants and could help fill the financing gaps in EdTech where conventional VC remains hesitant (European Commission, 2022b). In sum, innovative financing mechanisms and PPPs are being looked at as ways to bolster the capital supply for Dutch EdTech ventures, especially in areas that are not immediately profitable but have high educational impact potential.

Investor Climate and prospects

The current funding climate for Dutch EdTech is cautiously optimistic. There are capital and interest available in the ecosystem, but moving from early promise to a scalable enterprise still requires better alignment between founders, investors, and public stakeholders. Investors interviewed repeatedly emphasised that patience and sector-specific understanding are essential, as **education markets simply scale more slowly than consumer-tech or fintech markets**. As one investor stressed, ***"I wouldn't just look for money, but also for expertise… in distribution… in sales."*** This reflects a broader recognition that EdTech ventures need patient capital and partners who prioritise educational value alongside financial returns. Without that perspective, traditional VC metrics (fast growth, quick exits) can make even high-impact education startups appear unattractive on paper. Indeed, some founders noted that late-stage deals often falter at the last mile, not because the startups lack potential, but because investors get cold feet about the education market's dynamics. This suggests a need for more specialised, domestically anchored growth capital vehicles that understand K-12 procurement quirks and school-year seasonality and can support companies through those hurdles.

There are several ways to reinforce the capital pillar of the ecosystem. One priority is to bring more international EdTech investors and funders into the Dutch scene, for example, by hosting EdTech showcase events and leveraging success stories to raise the country's profile as a burgeoning EdTech hub (Dutch EdTech Foundation, 2024). Growing the pool of local ***"smart money"*** is another route: turning successful founders and executives from previous ventures into angel investors for the next generation would inject both capital and hard-won sector knowledge into new startups. This kind of recycling of entrepreneurial success is common in mature startup ecosystems and could greatly benefit Dutch EdTech. Additionally, public reports highlight the need for innovative financing instruments tailored to education, such as outcome-based funding (where investment or repayment is tied to learning outcomes achieved) and hybrid public-private co-investment models that share risk (European Commission, 2022b). Such instruments could entice more capital into the sector by aligning investments with impact and by mitigating risk for purely private investors.

Overall, existing support structures including accelerators, micro-grants, and seed funds, have been effective at boosting pre-seed and seed-stage startups, but they do little to unlock the larger Series A/B rounds needed for scaling (Techleap, 2025; Dutch EdTech Foundation, 2024). These early-stage programmes are necessary but not sufficient for building large, sustainable companies. Closing the growth-stage gap will likely require intentional use of bigger funding programmes and ***"smart capital"*** that comes with expertise and networks. Stakeholders pointed to a mix of established and more recently introduced funding instruments that could, in principle, be mobilised for growth-stage EdTech. Longer-standing vehicles include national funds such as the Dutch Future Fund and InvestNL's Deep Tech Fund (€250m), while newer European mechanisms focus on late-stage scaleup finance and de-risking, including the European Tech Champions Initiative, the EIC Accelerator, and InvestEU/EIF guarantees and venture debt. (EIB/EIF, 2024; EIC, 2025). While not EdTech-specific, such programmes could provide the kind of €5–15+ million checks that are currently very rare in Dutch EdTech. During the stakeholder workshop, participants bluntly noted that ***"funding [for EdTech] is not big"*** in the Netherlands, underscoring that more

sizable follow-on investments, the ***"big tickets"***, are needed. They also highlighted that startups must improve their investment-readiness (financial literacy, understanding of funding options, setting realistic investor expectations) so that when opportunities for capital do arise, companies can seize them.

Finally, interviews added practical texture to these challenges: stories of term sheets that collapse late in due diligence, exclusivity periods that drain a startup's cash, and seasonal revenue troughs that leave companies vulnerable. Together, these issues make the bridge from seed to scale exceedingly precarious. Addressing these frictions with a smarter blend of capital and support will be decisive for the next stage of Dutch EdTech growth. In practice, that means pairing investments with educational expertise and evidence of impact, ensuring funding timelines fit school calendars, and helping Dutch startups expand into international markets without losing their local roots. If the Netherlands can mobilise such smart growth capital, it will greatly increase the odds that today's innovative EdTech startups become tomorrow's scaleups delivering both economic returns and educational value.

Market

The Dutch K-12 market offers significant opportunity for EdTech, but it is also highly decentralised and cautious. Long sales cycles, fragmented buying processes, and a strong "prove it first" culture make it hard for innovations to scale across schools. Meanwhile, the pace of AI-driven innovation is accelerating, raising the stakes – if the ecosystem keeps relying on lengthy one-off pilots, new solutions risk stalling before they reach classrooms at scale.

The **Market** domain encompasses the demand conditions, customer base, and overall business environment that Dutch EdTech ventures face (especially in PE and VE). A vibrant EdTech ecosystem requires a receptive market: early-adopter schools and forward-thinking educators, sufficient demand at scale, and viable pathways to reach customers. In the Netherlands, there is significant opportunity in the K-12 education market (around 2.5 million students in PE and VE) (DutchNews, 2025). However, there are also structural challenges in how schools adopt technology and how EdTech companies reach them.

Market structure and customer segments

The K-12 education market remains concentrated around a handful of established content and platform providers. In VE, three major publishers, Noordhoff, Malmberg, and Thieme-Meulenhoff along with a few students SIS and LMS vendors, still supply the majority of teaching materials. In PE, publishers like Zwijsen are more prominent. In fact, four educational publishers (Noordhoff, Malmberg, Thieme-Meulenhoff, and Zwijsen) currently control about 80% of the schoolbook market. New entrants have slowly been gaining share in recent years, but the pace of change is slow.

Stakeholders describe two practical barriers to schools switching away from incumbent providers:

- **Teacher Effort:** The cognitive and workload cost for teachers to learn and confidently apply a new set of materials. Teachers are reluctant to adopt unfamiliar methods that add to their prep time and stress.
- **Fragmented Systems:** Lesson delivery, assessment, and student data often reside across multiple systems (publisher platforms, school ELO/LMS, and student information/ analytics systems). This creates friction when schools try to mix and match providers mid-year, as systems may not integrate smoothly.

Some school-publisher arrangements now offer hybrid bundles (print + digital, modular purchasing, etc.) that allow more flexibility than before. This suggests that market concentration is not absolute, but changes remain gradual. A school board director quipped that ***"je kunt niet zomaar meer een boek krijgen zonder dat je ook een licentie moet hebben voor een digitaal leermiddel…" ("you can't just get a textbook anymore without also needing a digital tool license")***, which often leads schools to pay for tools they do not fully use. Because switching content or platforms mid-stream costs schools so much capacity, founders note that sales cycles in K-12 are long, seasonal, and high stakes. Even if procurement frameworks technically allow schools to buy from new providers, in practice schools will only switch when they trust the quality, curriculum alignment, privacy/security guarantees, and onboarding support of a new offering.

To ease some of these frictions, national initiatives by Kennisnet, SIVON, and the new Edu-V programme continue to push for interoperability standards and shared APIs that lower switching and integration costs. Thanks to common agreements in Edu-V, schools can use digital applications with less effort and risk, helping them provide future-proof education. These efforts aim to create a more ***"level playing field"*** where schools can more easily try out and adopt solutions from different vendors.

Procurement and adoption pathways

Public procurement rules certainly influence buying, but their effects are more nuanced than a blanket ***"schools can't buy from newcomers."*** In many cases, schools (or groups of schools) tender for a distribution or service contract that gives them a general license to buy educational materials. Within that framework, they retain flexibility to select specific learning resources – including from newer providers, even mid-contract, as long as purchases remain within budget and below certain thresholds. In other words, formal procurement policies are not always the literal blocker to adopting new EdTech.

However, founders still face long sales cycles because schools are cautious, overloaded, and risk averse. Decision-making units in schools are fragmented; a Dutch school can feel like ***"a many-headed monster"*** in terms of who you have to convince. Teachers, ICT coordinators, and school boards all have a say, which adds time and complexity to each sale. Curriculum time is tightly squeezed by other priorities (e.g. addressing teacher shortages and focusing on *basisvaardigheden, the basic skills*), budgets for experimentation are limited, and any significant switch requires considerable teacher effort for training and onboarding. These behavioural and capacity constraints, rather than pure legal lock-out, are what truly slow down adoption of new EdTech in both PE and VE.

Interviews with schools and entrepreneurs suggest that procurement is often more nuanced than a simple lowest-price competition. In VE, for example, tenders typically focus on services (distribution, fulfilment) and result in a ***"license to buy,"*** after which schools have considerable freedom to choose specific textbooks or digital methods. This flexibility means in principle a new product can be adopted mid-cycle if it proves itself and stays under certain spending limits. Thus, the friction EdTech startups experience is less about formal impossibility and more about the cumulative burden of due diligence,

integration, and change management in busy schools with scarce time and tight budgets.

Across the ecosystem, there is recognition that procurement needs to enable more modular and interoperable choices – essentially a more **level playing field** for newcomers. A school leader welcomed NOLAI's aim to offer low-cost, open AI prototypes to ***"doorbreken die monopoliepositie" (break the monopoly position)*** of major publishers, reflecting a demand for alternatives that are easier to try, adopt, and combine with existing methods. Entrepreneurs echoed this, stressing that the current process too often treats them as vendors rather than partners who can co-shape innovation with schools. One founder, reflects on a multi-year tender as ***"it drains anyone's energy,"*** arguing that procurement designed for commodities is ill-suited to fast-moving educational innovation. Schools, in this founder's view, ***"need partners… to help you transform"*** rather than just product suppliers when adopting new technology.

Market access and adoption challenges

Stakeholders widely agree that selling to schools and scaling adoption remain the toughest hurdles for Dutch EdTech ventures. Achieving viability requires reaching large numbers of teachers and students, and both sustained implementation support and sufficient financial runway, since onboarding and integration in schools take time and usually only convert to stable revenues over long school-year cycles. As one founder put it, ***"go-to-market with schools is difficult… [the] sales processes are long… [and] require a lot of support"***. Pilots frequently stall; as several noted, the success rate of pilots in the Netherlands is ***"heel laag" (very low)***, especially when young companies cannot fund the extensive training and change-management effort needed to turn a pilot into a full implementation.

Several structural and cultural factors reinforce each other to create these challenges:

- **Highly Decentralised Decisions:** There are over 6,500 primary schools and about 1,450 secondary schools in the country (DUO, 2024), each with its own decision path. This means many parallel choices instead of one unified market, which greatly slows down nationwide scaling.

- **Scarce Time and Competing Priorities:** School staff have very little slack. Acute issues like teacher shortages and renewed focus on core skills consume attention. Administrators and teachers have limited bandwidth to consider, test, and implement new digital tools.

- **Limited Experimentation Budgets:** Financially, most schools operate under tight budgets with little room for piloting unproven tools. Any discretionary funds often go toward pressing needs, making it hard to justify spending on experimental EdTech without clear evidence of impact.

- **Procurement Constraints:** Fragmented procurement processes and long-term bundle contracts with incumbent providers creates inertia. Even if rules allow switching, in practice many schools are locked into multi-year deals. As one workshop participant summarised, ***"The purchasing conditions are stacked against EdTech newcomers."***

- **Cautious Culture:** Dutch educators tend to be cautious and value evidence and pedagogy over novelty. Schools want to see proof that a tool actually improves learning outcomes before adopting at scale. There is also some lingering wariness of commercial influence in education – one interviewee observed that some schools still think ***"commerce is dirty"*** when it comes to learning.

- **Post-Covid Skepticism:** The rushed digitalisation during COVID (when schools abruptly shifted online) left a mixed legacy. Many teachers and parents experienced tech fatigue or saw underwhelming results from emergency remote learning tools. This has made some stakeholders more skeptical of new EdTech claims, at least in the short term.

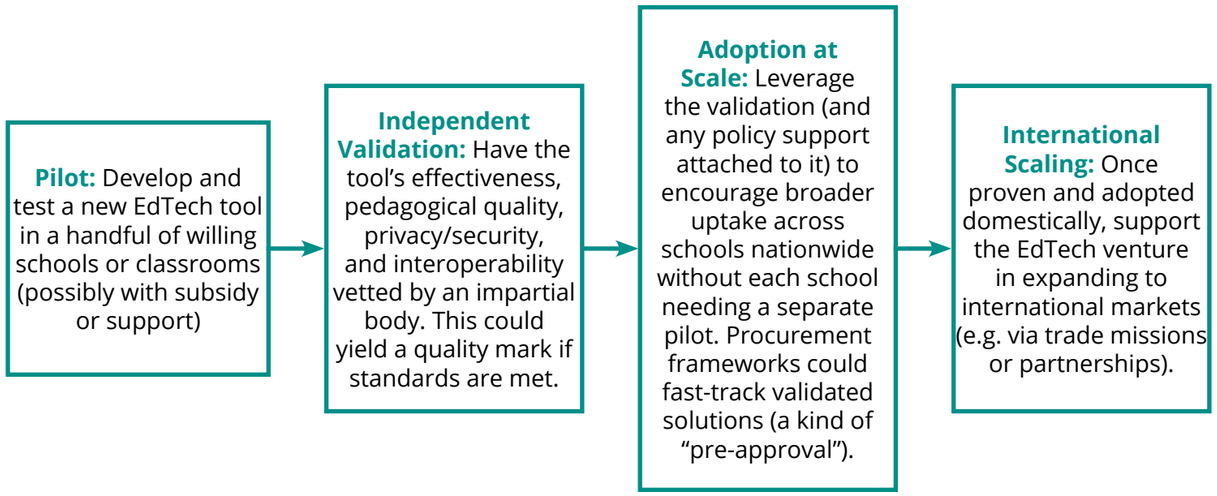
- **Timing and Seasonal Cycle:** The school calendar compounds the challenge with major purchasing and implementation decisions typically happening on a yearly cycle. Missing the budgeting or planning window by a few weeks can delay an innovation by a full year (***"missing two months is a year later"*** in the words of one founder). This timing gap can be fatal for small startups.

- **Support and Scale-Up Costs:** Going from a pilot to a school-wide rollout often requires substantial teacher training, ongoing customer support, and marketing outreach to get buy-in from all stakeholders. Small startups often lack the talent and capital to provide this level of support across many schools, leading pilots to fizzle out before reaching full adoption.

Despite these barriers, interviewees remain cautiously optimistic. Dutch schools are generally well-equipped and open to technology that clearly improves teaching and learning. Teachers become receptive when tools solve real classroom problems and avoid ***"technology for technology's sake."*** As one veteran EdTech founder noted, ultimately impact, not novelty, is what matters. A senior official similarly highlighted a shift toward using learning data to inform ***"the next step"*** in instruction, suggesting that if EdTech can prove it helps teachers help students, schools will listen.

From pilots to scale: a faster pathway

A recurring bottleneck identified is the ***"pilot paradox"***. With AI-driven innovation advancing rapidly, the traditional approach of fragmented, one-off pilots is too slow and inefficient to bring good solutions to all classrooms in time. Stakeholders argue for a shorter, more structured pathway, moving from pilot to proof to scale in a predictable way, so that promising innovations don't languish in perpetual trial mode. In broad strokes, this would mean a sequence such as:



International models illustrate aspects of this approach, for example, some countries have EdTech validation frameworks or national ***"EdTech testbeds"*** that build trust and accelerate purchasing of vetted tools. Stakeholders in the Netherlands propose a similar Dutch K-12 EdTech testbed: a national programme with transparent, educator-defined criteria for pedagogical effectiveness, data privacy, and technical integration. The testbed would allow new products to be evaluated in real school settings, and those that meet the bar would earn a recognisable quality mark that school boards can rely on. Such a pathway would help schools treat entrepreneurs ***"not as vendors but as partners,"*** reduce duplicative pilots across the country, and create a clear on-ramp for evidence-based tools to spread nationally and eventually abroad.

Key implications for the Dutch market are straightforward:

- Keep both PE and VE in scope so any solution should address the needs of primary and secondary schools, even though the segments and incumbent players differ.
- Target teacher switching costs (time, training, and curriculum fit) at least as much as technical integration issues, since teacher adoption is the linchpin of success.
- Align procurement with innovation by pairing the existing ***"license to buy"*** flexibility with faster, credible evidence signals (so schools feel safe to buy a new tool).
- And critically, build a testbed-to-validation route so that the education system can absorb innovation at the speed that teachers and students now require, without sacrificing trust or quality control.

Throughout the interviews, one theme was constant: collaboration beats one-off transactions. Schools need partners ***"to go on a journey together,"*** and entrepreneurs need predictable routes from pilot to proof to purchase. Converting that shared insight into an operating model supported by Kennisnet/SIVON interoperability standards, NOLAI's co-creation practices, and validation mechanism, would enable the market to embrace EdTech innovation at the necessary pace. By establishing a faster pathway from pilots to scale, the Dutch K-12 market can become more responsive to new technology while still upholding the values of evidence, equity, and educational quality that educators demand.

Talent & Knowledge

The EdTech ecosystem in the Netherlands faces a talent gap: there is a shortage of professionals and founders who combine deep educational domain knowledge with strong tech and business skills. Strengthening human capital through education, training, and knowledge-sharing is critical to drive innovation. Equally important is cultivating a culture that encourages entrepreneurial activity in the education sector.

The **Talent & Knowledge** domain covers the human capital available to the EdTech ecosystem and the mechanisms for knowledge creation and exchange. Entrepreneurial ecosystems depend on skilled people – founders, employees, educators, researchers – and on the diffusion of ideas and evidence that drive innovation. In the context of Dutch K-12 (PE/VE) EdTech, this domain examines the availability of talent (people with both education and technology expertise) and the integration of knowledge (from research and practical experience) into EdTech development.

Entrepreneurial and workforce talent

The Netherlands benefits from a strong general talent base and very high English proficiency, which supports its international growth. EdTech founders in the country come from both education (***"edupreneurs"***) and the technology sector, and the strongest teams blend expertise from both. However, truly interdisciplinary founding teams remain the exception rather than the rule. Some startups still pursue a technology-driven approach without early teacher input, which often leads to weak classroom fit. By contrast, tools co-designed with teachers, for example, modular ***"Lego-like"*** curriculum building blocks developed with direct teacher involvement, tend to gain traction faster because they solve daily pain points for educators.

The most difficult skill profiles to hire are hybrid ***"learning engineers"*** who can translate pedagogy into product development with data/AI fluency. As one interviewee noted, ***"Learning Engineer is schaars,"*** meaning ***"such experts are scarce"***. Likewise, commercial specialists who understand both how to sell/market products and the school context are in short supply. Several founders stressed that many education-driven teams underweigh commercial execution. One veteran founder advised spending ***"half your time"*** on go-to-market activities, i.e. distribution, integration into teacher workflows, and making the product part of daily teaching and learning, or risk ***"dying in beauty"*** (building a great product that fails to spread). Another founder echoed the mantra ***"pedagogy above technology"*** and promoted a pay-it-forward mentoring ethos. Yet even these experienced founders noted the lack of structured collaboration with larger industry players.

Talent gaps become especially visible at the scaleup stage. Early-stage teams often lack expertise in areas like sales, marketing, procurement, and international expansion, roles that require both business acumen and knowledge of the education sector. With few local EdTech success stories to date, there is also a shortage of seasoned mentors and executives in the ecosystem. Although only 9% of founders currently cite talent as their main barrier (Dutch EdTech Foundation, 2024), many recognise it will become a challenge as they scale. Furthermore, relying solely on a mission-driven culture can lead to burnout in small teams.

Beyond generic networking events, founders voiced the need for more targeted support in several areas:

- **Market knowledge:** Understanding school buying cycles, decision-making units in PE vs. VE, procurement pathways, and developing pricing/ROI cases for schools.
- **Scaling playbooks:** Guidance on moving from a pilot to multi-school rollouts, including how to onboard and train teachers with minimal additional workload.
- **Internationalisation roadmaps:** Insights on entering new markets, which countries to target first, finding local partners, and meeting compliance requirements in those markets.
- **Evidence-to-product skills:** The ability to embed learning science into product design, run pragmatic trials in school settings, and translate the results into evidence-based marketing or adoption collateral.

Multiple interviewees underscored that schools prefer partners who will ***"go on a journey together,"*** not just transactional vendors. In practice, this means EdTech providers need to blend product expertise with pedagogy and change management skills, working alongside schools over time rather than delivering a one-off tool.

Promising responses to the talent gap are beginning to emerge. NOLAI's co-creation projects, for example, pair teachers, researchers, and developers on new EdTech initiatives, building hybrid skills within teams while also improving product-classroom fit. Founders involved in these co-design cycles report faster iteration on genuine classroom use-cases (NOLAI, 2023). The Dutch EdTech Foundation's community initiatives have helped normalise a ***"pay it forward"*** mentoring culture among founders. Stakeholders have recommended going further by introducing leadership programmes, edu-tech fellowships (embedding educators in tech companies and technologists in schools), and formal co-founder matchmaking to assemble more balanced teams (European Commission, 2022b).

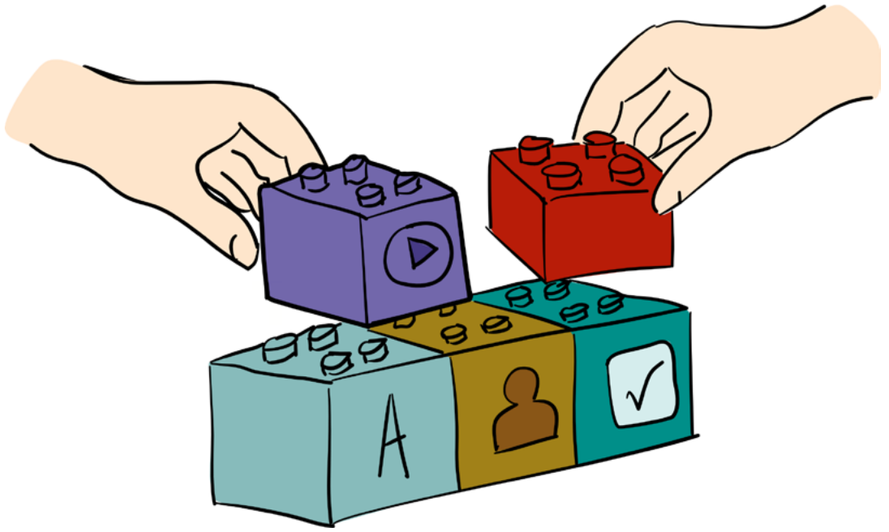
Knowledge creation and exchange

A strong EdTech ecosystem depends not only on talent but also on knowledge flows where research informs practice, and lessons from the field inform new research. The Netherlands has a rich education and technology research base. However, there has long been a disconnect between academic research and EdTech entrepreneurship. Research findings often remained too theoretical or inaccessible, while startups lacked the time and capacity to translate academic insights into practice (European Commission, 2022b).

This gap is now starting to narrow. NOLAI's ***"living lab"*** approach embeds research pilots directly in classrooms and involves EdTech companies in the process. Instead of running small, isolated trials, new EdTech prototypes are tested and refined in real classroom settings, generating evidence-informed insights and improving product-classroom fit (NOLAI, 2023). Interviewees highlighted the importance of this approach. One expert noted that EdTech initiatives in the past were often driven by ***"technology push,"*** and argued that the sector must ***"invest more in learning science knowledge"*** so products are grounded in pedagogy rather than hype. The Netherlands already has abundant educational research and experienced teachers; the key challenge is building mechanisms to translate that expertise into product design.
At the community level, knowledge-sharing among EdTech entrepreneurs has improved greatly since 2020. Peer founder networks, ROMs, sector initiatives, and communities of practice now regularly exchange know-how on practical topics like selling to schools, navigating compliance (e.g. GDPR privacy rules), and go-to-market strategies. Universities and foundations also organise hackathons and startup weekends to spur interdisciplinary collaboration. However, founders report that most peer support today centres on operational know-how (such as sales into schools and privacy compliance). More specialised scaling knowledge, for example, how to internationalise, secure growth financing, or meet evidence standards is still harder to access and often not openly shared. Founders explicitly asked for more structured guidance and ready-to-use templates, rather than ad-hoc tips exchanged informally. Several interviewees also called for cross-vendor data alliances (connecting student information systems, learning management systems, publishers, and tool providers) under school-led governance. Such alliances could unlock richer learning analytics, but today they are hindered by fragmentation and privacy complexities.

Stakeholders therefore proposed several ways to strengthen knowledge creation and sharing in Dutch EdTech:

- **Learning-engineering capacity:** Develop short courses and micro-credentials that merge instructional design, AI/data skills, and product thinking, open to teachers, product managers, and engineers to build ***"learning engineer"*** skill sets.



- **Evidence standards & translation:** Promote pragmatic study designs for EdTech (e.g. A/B tests, stepped-wedge trials, research-practice partnerships) and create a shared template to turn results into decision-ready briefs for school boards (clearly showing ***"what worked, for whom, at what teacher time cost"***).

- **Internationalisation support:** Provide market briefs, partner lists, compliance checklists, and warm introductions for first export markets, reflecting that Dutch EdTech solutions can and should scale beyond the Netherlands (Dutch EdTech Foundation, 2024).

- **Mentor/angel flywheel:** Encourage successful founders to become angel investors and advisors, to provide ***"smart capital"*** (funding combined with expertise) and pattern recognition to new startups.

Educator involvement in EdTech design and development

Interviewees consistently stressed that **educators must be at the centre of EdTech design, not simply treated as end-users.** In fact, some of the most successful Dutch education innovations have originated from teachers who personally experienced classroom problems. For example, one teaching assistant built a Q&A tool out of necessity, and a primary teacher co-founded an adaptive content platform to reduce duplicate lesson planning and allow colleagues to share modular curriculum materials. These teacher-led initiatives worked precisely because they addressed concrete classroom needs, and they gained rapid traction during pilot implementations.

Several stakeholders argued that closer collaboration between teachers and EdTech developers is essential to improve both adoption and effectiveness. One expert observed that teachers are often under-utilised in innovation processes, even though they hold the knowledge needed to design relevant solutions. By incorporating teacher feedback to refine early prototypes, collaborations generate tools that better fit the realities of teaching practice.

Founders echoed the importance of teacher involvement. For instance, a classroom seating-planning tool based on academic research gained traction after teachers were consulted and a public grant helped convert the research into a practical app. Once it was made freely available to educators, adoption grew rapidly to several thousand users. This demonstrated that teacher involvement and free early access can accelerate uptake far more effectively than a top-down rollout. Founders also emphasised that schools value partners who ***"go on a journey together,"*** reinforcing the need for iterative feedback loops rather than one-off deployments.

Educator involvement is also connected to broader questions of teacher empowerment and autonomy. A school board leader pointed out that while higher-education instructors routinely create their own materials, K-12 teachers have traditionally relied on publisher-provided packages. He openly ***"cheers on"*** experiments that allow teachers to customise or co-create their own tools, arguing that this cultural shift is necessary for long-term improvement.

Related & supporting industries

A supportive ecosystem of incubators, industry partners, and open data initiatives is emerging to help EdTech solutions reach classrooms, though more dedicated educational technology hubs are needed. In the Netherlands, related industries like educational publishing and global tech platforms offer essential infrastructure but can also dominate, posing challenges for new entrants. Strengthening support hubs, fostering partnerships, and enforcing open standards are seen as key strategies to leverage these related industries for EdTech growth.

No entrepreneurial ecosystem operates in isolation. The **Related & Supporting Industries** domain encompasses the allied sectors, support organisations, and infrastructure providing complementary products and services to the EdTech ecosystem. In the Netherlands, such support plays a pivotal role for K-12 EdTech: general tech incubators and accelerators, the traditional educational publishing sector, the broader tech and creative industries (e.g. AI and gaming companies contributing technology or content expertise), and cross-industry partnerships that can bolster EdTech development. Below, we examine the state of these supporting industries and how they influence or enhance the Dutch EdTech ecosystem.

Incubators, accelerators, and innovation hubs

Dutch EdTech startups have benefitted from general incubators such as YES!Delft, Rockstart, Mercator Launch and StartupBootcamp, which provide early-stage coaching and investor access. However, dedicated EdTech-specific accelerators remain scarce. One of the few past programmes was the X-Learning Lab in the late 2010s, and its closure left a gap in EdTech-focused startup support. Since then, several ecosystem initiatives including sector networks, university incubators, and communities at locations have started to offer founder meetups, masterclasses, and joint visibility at international education fairs, e.g. the Marineterrein in Amsterdam. In parallel, regional tech parks (e.g. Brainport Eindhoven, Utrecht Science Park) now host EdTech pilots and events. Even so, stakeholders still perceive a support deficit compared to sectors like FinTech or HealthTech. More EdTech-specific programmes, ideally linked to seed funding, could accelerate development by providing the tailored mentorship and introductions that general incubators cannot always offer.

Stakeholders emphasise that structured guidance and curated introductions are especially valuable for first-time EdTech entrepreneurs who need help navigating schools and scaling social-impact solutions. Recent survey findings underline that many Dutch EdTech firms struggle most with visibility and market entry, and that targeted support with school and university partnerships, alongside better access to funding, is essential. European studies similarly call for more EdTech-specific incubators and accelerators. Going forward, the broader challenge is to strengthen and publicise such programmes so that access to specialised mentorship and pilots does not depend on personal networks, and so that dedicated EdTech support infrastructure becomes a structural feature of the Dutch ecosystem rather than an exception.

Allied industry - educational publishing and content providers

The educational publishing sector is a major force in K-12 EdTech in the Netherlands. A few long-established publishers together control about 80% of the school textbook and learning materials market. These players not only produce textbooks but also offer bundled digital platforms and content services for schools. Their dominance gives them significant market power and can crowd out smaller innovators. As one stakeholder commented, the major publishers' tight grip on distribution and content can be ***"limiting innovation"*** in the Dutch market. For example, if most schools already use a publisher's integrated learning environment, a new startup's product may struggle to get adoption unless it integrates with or goes through that publisher.

At the same time, publishers can serve as strategic partners or even exit routes for EdTech startups. There have been instances of startups licensing their technology to publishers or being acquired for integration into a publisher's portfolio. Such deals can inject resources and scale into the startup's innovation. However, they do not automatically strengthen the domestic EdTech entrepreneurial base; in some cases, they may simply absorb the innovation into an incumbent's offering, further entrenching that incumbent's dominance. To ensure positive ecosystem effects, collaborations with publishing giants should be structured around openness and fairness, for instance, using interoperability standards, ensuring data portability, and avoiding exclusivity arrangements that prevent the startup from serving other clients. It's important that when startups co-develop or partner with large content providers, they retain the ability to learn from the implementation and continue reaching schools beyond a single platform or publisher.

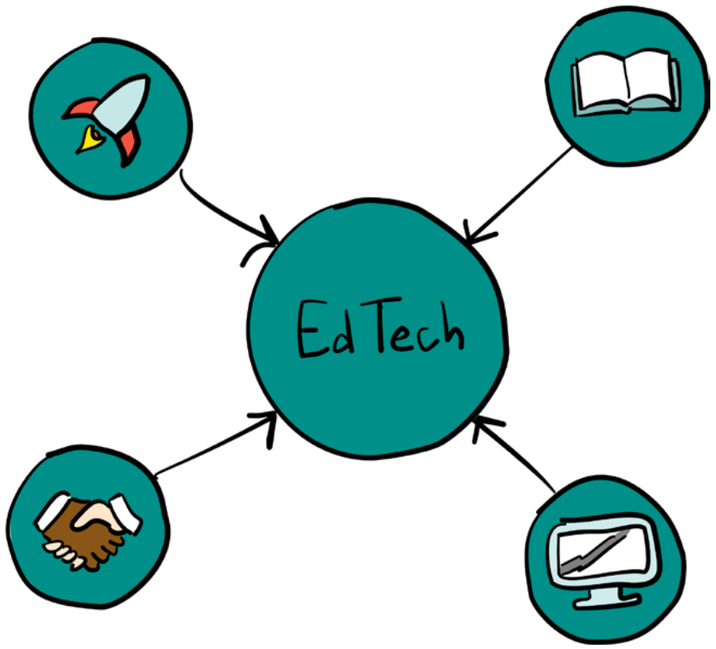
There are some encouraging developments on this front. Open standards initiatives are making it technically easier for new tools to integrate into school systems dominated by big publishers. For example, Kennisnet's *Entree Federatie* SSO service and the related *Edu-K/Edu-V* agreements provide common frameworks for identity management and data integration in Dutch schools (Edu-V, n.d.). These efforts, often backed by public entities like Kennisnet and SIVON, push publishers to open up their ecosystems so that third-party EdTech tools can plug in securely. Even the national competition regulator, the ACM, has taken note of the learning materials market. In 2025 the ACM announced it will conduct a broad market investigation into (digital) learning resources, citing concerns about potential market failures (Stibbe, 2025). This reflects pressure on incumbents to adopt more open practices and not abuse their dominant positions. If schools (as buyers) insist on interoperability and open standards when procuring learning materials, publishers will increasingly need to work with EdTech innovators rather than against them. The recent scrutiny including an ACM investigation and even the education ministry's interest in promoting competition, sends a signal to major publishers that they must enable connectivity (through APIs, data-sharing agreements, etc.) or risk intervention. In summary, **the publishing industry in the Netherlands is both an essential ally providing content infrastructure and a formidable gatekeeper**. Balancing this double-edged role requires policy and procurement measures that open up the market: rewarding publishers who collaborate on interoperability and creating space for startups to contribute innovative content and tools without being locked out by incumbent platforms.

Technology and creative industries support

The wider Dutch tech sector provides a strong foundation for EdTech innovation. The Netherlands has robust digital infrastructure, a highly skilled tech workforce, and vibrant AI and gaming industries that spill over into education. Many Dutch EdTech products already use AI and advanced analytics, reflecting domestic strengths in data and machine learning and giving local ventures an advantage in developing more sophisticated, engaging tools.

At the same time, K-12 classrooms increasingly run on global platform ecosystems from Google, Microsoft and Apple. These platforms provide essential functionality and convenient entry points for schools and can serve as powerful distribution channels for EdTech tools that integrate with Google Classroom or Microsoft Teams. However, they also deepen dependence: once documents, lesson plans and student data are embedded in a single ecosystem, switching costs rise, and the expansion of built-in learning, assessment and analytics features brings these platforms closer to the instructional core. Stakeholders warned that this trend shifts bargaining power away from schools, raises data-sovereignty concerns, and makes it harder for smaller providers to compete, even if avoiding these platforms altogether is neither realistic nor desirable.

In response, the Netherlands has invested in shared digital infrastructure and open standards to keep the market contestable. Initiatives such as Kennisnet's identity federation and the Edu-V agreements aim to ensure that tools can plug securely into school systems, while SIVON negotiates collective contracts and data-portability requirements on behalf of school boards. These arrangements lower switching vcosts, reduce vendor lock-in, and create clearer technical pathways for newcomers, although compliance demands can be challenging for very young startups. Most Dutch EdTech companies therefore integrate pragmatically with dominant platforms via single sign-on, rostering APIs and plugins, while differentiating on pedagogy, user experience, local content and evidence of impact. The policy challenge is to maintain this balance: leveraging global platforms for infrastructure and reach, while enforcing interoperability, transparency and bargaining power for schools so that domestic innovation can continue to develop.



Collaboration and linkages

Stakeholders across the board underline that stronger coordination is needed in the Dutch EdTech ecosystem. Promising pilots, academic projects and startup trials still too often run in silos, with limited knowledge sharing and slow diffusion of what works. A tool may be piloted in one region or a study done at one university, but lessons do not automatically reach other schools or companies. Community-building efforts since 2021 (meetups, online networks, joint stands at fairs) have helped, yet deeper public–private partnerships are needed to connect research, practice and entrepreneurship. Multi-stakeholder pilots in which companies, researchers and schools co-design and test AI-based tools in real classrooms are seen as a promising model to close the "last mile" between innovation and classroom impact.
Several ideas have been proposed by experts and stakeholders to enhance collaboration and linkages in K-12 EdTech:

- **Matchmaking Platform:** Create a national platform (like the *NPuls* initiative in higher education) that inventories schools' needs and challenges and lists available EdTech solutions. This would help match demand and supply, allowing schools to find vetted tools for their specific problems and startups to find early-adopter schools.

- **Innovation Hub Schools:** Designate or establish a set of ***"lab schools"*** or innovation hub schools where new EdTech tools can be tested in a real-classroom environment with support. These schools would partner with startups and researchers, acting as living labs. Results and learnings from these testbeds would be shared nationally. For instance, one interviewee described a pilot where university researchers worked alongside a developer to observe how an AI-based feedback tool influenced classroom participation where teachers provided real-time feedback to the designers, and researchers measured engagement changes. Scaling up such collaborative pilots (and rotating them across regions) could accelerate evidence-based innovations.

- **Cross-industry Collaboration:** Facilitate more structured collaboration between traditional publishers, EdTech startups, academic researchers, and school consortia. Rather than each working in parallel, joint projects could be initiated (with clear data-sharing agreements and IP terms). This kind of consortia approach can help new solutions reach classrooms faster while building local evidence. It also helps publishers innovate by proxy without stifling the startup, as long as terms are fair.

Implementing these ideas will require leadership and targeted incentives, but there are existing building blocks to build on, such as Kennisnet and SIVON's work on innovation-friendly procurement and the Edu-V data standards. Anchoring new collaboration mechanisms in open standards and transparency can help turn successful prototypes into scalable solutions while preserving space for domestic innovators. Overall, the Dutch K-12 EdTech ecosystem has many strong ingredients (talent, technology and an engaged education sector); strengthening the linkages between them will determine how quickly and broadly EdTech innovations translate into improved learning outcomes.

Entrepreneurs & Innovators

Entrepreneurs are the engine of the EdTech ecosystem, and in the Netherlands, they are often driven by a strong social mission. However, the EdTech startup community is still relatively young and fragmented. Fostering a more cohesive culture of collaboration, mentorship, and even consolidation among EdTech founders – while encouraging a bit more risk-taking and "growth mindset" in a traditionally cautious education sector – could amplify the collective impact of innovators.

The **Entrepreneurs & Innovators** domain focuses on the founders and startups at the core of the Dutch EdTech ecosystem. In the Netherlands, many EdTech founders are motivated by a mission to improve education through technology. The community of EdTech startups has grown rapidly, from only a handful a decade ago to roughly 475 EdTech companies by 2024, creating a larger peer network and more visibility. Yet it remains relatively young and somewhat fragmented, with few large exits or "unicorns" to date. Building a more cohesive culture of support, shared learning, and strategic ambition among these entrepreneurs could greatly increase their success rate and impact. This section examines who Dutch K-12 EdTech founders are, the culture they operate in, and the key success factors and challenges they face, recognising that their efforts ultimately drive the outcomes of the entire ecosystem.

Diversity of Dutch EdTech entrepreneurs

Dutch EdTech founders come from diverse backgrounds. A significant subset are former teachers or school administrators turned entrepreneurs: ***"edupreneurs"*** who bring deep understanding of pedagogy and classroom needs. Others are technologists or business professionals who were drawn to education as a sector where they want to make a difference. The most effective founding teams tend to include both perspectives (education and tech/business). However, many teams tilt one way or the other. Education-first founders may lack startup and scaling experience, while tech-first founders may misjudge the complexity of schools. Several interviewees noted that despite the growth in number of EdTech startups, it's still relatively rare to find a team with a strong educator, a strong technologist, and a strong commercial lead all together from the start.

Encouragingly, the community has grown to a size where founders can find peers and even co-founders more easily than before. The rise in the number of EdTech companies suggests new entrants are continually coming in. Some are spin-offs from universities or research projects; others emerge from hackathons or even school initiatives. There is also a small but growing group of serial entrepreneurs and second-time founders in EdTech, which was virtually non-existent a few years ago. This diversity of entrants is healthy, but it also means the community includes many first-timers still learning the ropes of entrepreneurship.

To convert early-stage momentum into scalable businesses, stakeholders pointed to the need for more structured scaleup support for founders. Today, much of the learning is ad hoc – new founders rely on personal networks or trial-and-error to figure out how to raise a Series A, how to market to schools nationally, or how to expand abroad. Targeted programmes (as mentioned in the Talent domain) could provide:

- **Experienced mentorship:** pairing first-time founders with veterans who have scaled startups (whether in EdTech or adjacent sectors) to guide them through growth challenges.
- **Investor-readiness coaching:** helping entrepreneurs refine their business models, set realistic metrics/KPIs, and craft pitches that resonate with investors who may not know the education market well.
- **International matchmaking:** offering ***"soft landing"*** support for exploring markets like Germany, Scandinavia, or the UK – for example, introductions to local resellers, help with translating content or aligning to foreign curricula, and insights from Dutch companies that already expanded internationally.

Founders themselves echoed the value of such support. One noted that a short programme on EdTech growth taught by someone who had exited an EdTech company would have saved them ***"a year of mistakes."*** Others mentioned the benefit of simply being able to call a peer who'd tackled a similar problem.

Mission-driven mindset

Most Dutch EdTech founders are strongly mission-driven, often inspired by personal experiences as educators or students. This mission-driven ethos is a distinguishing strength of the ecosystem – it means the products are typically developed with a keen eye on solving real educational problems (reducing teacher workload, improving student engagement, supporting underserved learners, etc.). Many entrepreneurs speak passionately about impact and express a commitment to social values alongside business goals.

However, stakeholders also noted that this emphasis on ***"doing good"*** can sometimes come at the expense of ***"doing well."*** In other words, founders may focus so much on pedagogy and impact that they neglect the business fundamentals needed to sustain and scale their solution. The interviews revealed that too few EdTech entrepreneurs in the Netherlands think beyond the prototype or initial pilot phase. They pour energy into developing a great product and proving it works in a few classrooms, but don't plan sufficiently for how to reach hundreds of schools, how to generate consistent revenue, or how to fend off competitors. This can limit investor interest and slow expansion – as one feedback report put it, the entrepreneurs are ***"described, not supported".***

Practical supports like go-to-market playbooks for PE/VE, template financial models tailored to school sales, and workshops on pricing and procurement could help these mission-driven founders pair their educational passion with commercial savvy. For example, understanding how to calculate and communicate the ROI of their tool for a school is crucial for convincing school leaders to buy in. Some founders admitted they initially assumed that if a tool helped students, schools would ***"of course"*** adopt it, a well-meaning assumption that turned out to be naïve in practice. Now they realise they must also articulate the value in administrative and economic terms.

The Netherlands currently lacks a clearly articulated EdTech founder playbook, a go-to guide or pathway that many founders in other sectors develop by learning from predecessors. In more mature startup scenes, there might be an informal playbook like ***"here's how you raise a seed round in fintech"*** or ***"here's the typical timeline to scale a SaaS company."*** For Dutch EdTech, such pattern recognition is only just forming. Founders said they mostly learn this informally, via personal networks or by piecing together advice from general startup materials. Stakeholders argued that a Dutch EdTech playbook should be co-created by those in the field, capturing lessons on validating in schools, meeting regulatory requirements, securing smart capital, proving learning impact, navigating procurement, and eventually internationalising. Having this kind of shared roadmap would not only guide individual entrepreneurs but also signal to investors and partners that the ecosystem is becoming more mature and investment ready.

Collaboration over competition

Despite operating in a challenging domestic market, Dutch EdTech startups tend to collaborate more than they compete. Founders frequently share advice and even resources with each other. It's not uncommon for entrepreneurs to make warm introductions for each other to a useful contact at a certain school, or to collectively sponsor a booth at Bett to save costs. In interviews, many founders spoke highly of this community spirit. One called it ***"collegial competition,"*** where each company obviously wants to succeed, but not at the expense of the overall mission of improving education.

Stakeholders suggested expanding this cooperative ethos by organising joint demo days and perhaps even encouraging strategic alliances among startups. For instance, multiple small startups with complementary products might jointly approach a school board with a more comprehensive solution, rather than each trying separately to get the school's attention. In some cases, there have been discussions about merging or bundling startups to create a stronger offering, essentially ***"venture building"*** within the community. As one participant remarked, *merging startups + scaleups* for rapid growth and prosperity could help overcome market fragmentation and provide more weight in negotiations with schools or investors. This is admittedly delicate, but the fact that it's being discussed shows a willingness to think creatively.

International examples illustrate what a more concentrated network can achieve. In Switzerland, the LEARN initiative in Lausanne acts as a hub connecting EdTech research, startups, and schools in one physical space; and in Belgium, *EdTech Station* has created a co-working and collaboration hub for education innovators. These hubs help concentrate networks, reduce search costs, and accelerate trust-building. Stakeholders noted that the Netherlands would benefit from a comparable focal point whether a physical campus or a well-organised virtual network that continuously brings together entrepreneurs, educators, investors, and policymakers.

Self-reflection & learning

Another theme that emerged is the importance of self-awareness among founders and knowing when to seek help. Stakeholders emphasised that successful entrepreneurs are often those who recognise what skills their team is missing and bring in complementary expertise. For example, a pair of teachers who start a company might reach a point where they need a seasoned business to lead to scale further, or a technical founder might need to hire someone who deeply understands pedagogy to refine the product. There is sometimes a cultural humility in the Dutch EdTech scene – founders are mission-driven and not purely profit-driven, which can be a strength – but it needs to be paired with a willingness to think bigger and push beyond one's comfort zone. A few investors commented that Dutch EdTech founders could afford to be more aggressive in their growth ambitions and less afraid of experimenting on the business side.

At the same time, there is a growing interest in learning from those who have ***"been there before."*** The community is reaching an inflection where the first generation of EdTech startup founders (from early 2010s on) are starting to have exits or, in some cases, wind-downs and thus a wealth of experience that could benefit newcomers.

Mentorship & recycling of expertise

Stakeholders highlighted the need to formalise mentorship and the recycling of expertise within the ecosystem. While some experienced founders already advise others informally, this remains ad hoc and limited in reach. Participants proposed creating a kind of "mentor bank" or EdTech angel network, enabling founders who have exited or even those who have learned from failure to more systematically mentor and invest in newer startups. One participant summed it up as: ***"After exit/buyout: share knowledge with new startups."*** The idea is to harness the passion that exiting founders still have for education and channel it into guiding the next generation.

Additionally, there were suggestions for scaleup clinics or bootcamps on specific topics, for example, a mini programme on ***"selling to school boards"*** taught by someone who has done large school district deals, or a workshop on ***"evidence and validation"*** led by experts from a quality assurance body. These clinics would go beyond early-stage incubation and target startups at the moment they prepare to scale, effectively filling the gap between seed accelerator and late-stage success.

Encouraging founders to reinvest in the ecosystem, both in terms of time and capital, will help build a self-sustaining cycle. If even a handful of the EdTech companies achieve notable success and their founders become angel investors or mentors, that smart money and know-how can fuel dozens of new startups. We are already seeing the beginnings of this flywheel, and intentional efforts (like recognition awards for top mentors, or government co-investment schemes that match EdTech angels) could accelerate it.

Institutional & Cultural Context

The institutional and cultural context of the Dutch education sector influences EdTech adoption in significant ways. Strong autonomy at the school level, a consensus-driven education policy environment, and cultural caution toward commercial influence mean that innovation can be slow and requires trust-building. However, government initiatives and regulatory attention are starting to create room for EdTech, and there is growing recognition that a supportive policy framework – on procurement, data privacy, and open standards – and a culture shift in attitudes are needed to integrate technology in education responsibly.

The **Institutional & Cultural Context** domain looks at the broader environment in which Dutch EdTech operates: the policies, regulations, public programmes, and cultural attitudes that shape how education innovation unfolds. In the Netherlands, education is a public good that is carefully managed with stakeholder input (teachers' unions, parent councils, school boards, etc.), and changes tend to be deliberate and consensus-based. This context means EdTech initiatives must align with public values and often navigate a complex web of institutions. Below, we outline key aspects of the system and their implications for EdTech.

Education system structure and governance

The Netherlands combines national frameworks with substantial autonomy for individual schools and their governing boards. The Ministry of Education sets core objectives (like curriculum standards and exams) and provides funding, while intermediary bodies like Kennisnet offer guidelines on ICT and innovation. However, each of the 6,534 primary schools and 1,456 secondary schools (DUO, 2024) can make its own choices about tools and methods, as long as they meet broad requirements. This decentralised governance has pros and cons for EdTech: on one hand, it means a startup can start by working with a few innovative schools without needing system-wide approval; on the other hand, scaling up requires convincing many separate decision-makers. As one school leader put it, ***"you won't get far without teacher buy-in and board confidence."*** Even if a product is nationally endorsed, each school community will evaluate it independently.

Education policy development in the Netherlands is deliberately cautious and consensus-oriented. Rather than a single top-down ***"EdTech policy,"*** progress tends to emerge via pilot programmes, research projects, and multi-year innovation agendas that involve input from educators and experts. For example, the decision to invest in NOLAI and Npuls came after broad consultations and is being executed in collaboration with schools and universities. The government's role is often enabling rather than directing – providing grants, setting up frameworks (like Edu-V for interoperability), and safeguarding public values (like privacy through GDPR enforcement).
One current policy development is the plan to make digital literacy a mandatory part of the curriculum in secondary education by 2026. This move reflects an understanding that students need certain digital skills and critical competencies, and it is expected to indirectly raise demand for high-quality digital learning tools aligned with those goals. At the same time, it comes with an emphasis on ***"critical and safe use"*** of technology, meaning any EdTech integrated into core teaching must meet standards for security, privacy, and pedagogical soundness.

Another relevant aspect is the strong tradition of school autonomy and teacher professional judgment. Dutch teachers historically have a say in what and how they teach (within the bounds of the curriculum). If an EdTech tool conflicts with a teacher's approach or is seen as imposed from above, it may face resistance. Also, teachers teach more hours than in surrounding countries, leaving little time for lesson preparation and collaborating with fellow teachers on deciding what learning materials to use. Thus, institutional context requires EdTech innovations to not only clear technical and administrative hurdles but also to earn acceptance in the culture of teacher autonomy and to be evaluated within their available time.

Market regulation and competition

Public procurement and market regulation shape the EdTech landscape, though often indirectly. The government has generally taken a hands-off approach to dictating which tools schools use. However, it does shape the market through funding incentives and oversight of competition. For instance, as mentioned earlier, the Dutch competition authority ACM launched an inquiry in 2025 into the digital learning resources market, a sign that policymakers are concerned about the dominance of a few players and the potential hindrance to innovation. The mere prospect of this has put pressure on incumbents to avoid practices that lock out newcomers.

On the procurement side, European and national rules ensure open tendering and discourage long-term monopolies in public purchasing. In practice, as discussed in the Market section, many school boards tender for a service (like distribution or learning environment support) and then have flexibility under that umbrella. There has been discussion of making procurement more ***"innovation-friendly."*** Tools like innovation partnerships where a school can work with a startup to co-develop a solution, which later can be purchased if successful, or smaller ***"sandbox"*** procurements (below thresholds, to try something new) are being explored. Some school consortiums have already used these methods to pilot new products without running afoul of procurement rules.

Another institutional factor is data protection regulation, notably the GDPR. The Dutch interpretation of GDPR in education is strict: schools must ensure any digital product complies with privacy laws and often require suppliers to sign a DPA. Sector organisations (like SIVON) have negotiated model DPA clauses and even taken stands against big tech providers when terms were not acceptable. While this protects students and is in line with Dutch values on privacy, it also means EdTech startups must navigate legal checks early on. Those that have a clear privacy-by-design approach find it easier to gain school trust; any whiff of data misuse can lead to an institutional backlash (for example, past controversies over "free" apps that harvested student data have made schools very cautious).
Many interviewees stressed that PPP is key in a Dutch context. Rather than the government simply regulating more, the ideal is for government, schools, and industry to co-create solutions. One example is the Edu-V initiative, where public and private parties together set interoperability standards and agree on principles for digital learning materials. This collaborative governance model is considered more agile and effective than top-down regulation in a fast-moving field. It's a recognition that the ecosystem will not function if public institutions and private entrepreneurs operate in separate silos or at cross purposes.

Educational culture and attitudes

Dutch education culture strongly values quality, equality, and consensus. Changes in schools (especially in pedagogy or curriculum) are often introduced gradually and with pilot phases. Teachers are trained to be critical of fads and to focus on proven approaches. This cultural backdrop means that EdTech innovations are viewed through a skeptical lens until they demonstrate real benefit. "***Trust and proof come first,"*** as one interviewee summarised, an EdTech tool must earn its place by showing it can help students learn or reduce teacher burden, not just by being novel.

Another cultural aspect is the norm of stakeholder involvement in schools. Teachers, parents, and even students have formal channels to voice opinions on major decisions at school (*medezeggenschapsraad* or participation councils). If a new digital programme is introduced, school leaders often discuss it in these forums. If teachers or parents are uncomfortable (be it due to screen time concerns, data privacy, or simply the change it entails), their feedback can slow or halt adoption. This means EdTech providers must not only sell to a director or ICT coordinator but also win hearts and minds across the school community.

The Dutch also tend to be pragmatic. There's an appetite for experimentation but tied to practical outcomes. For example, during the pandemic lockdowns, schools embraced whatever tech was needed to keep classes running. But post-pandemic, there has been an evaluation of what helped learning and what didn't. Many teachers emerged more tech-savvy but also more selective. One educator noted that while they're now open to digital tools, ***"we have a sharper filter"***, if a tool doesn't align with pedagogy or takes too much time, it won't last.
Importantly, there is a cultural expectation that education technology respects public values. Concepts like equality (all students should benefit, not just a few), inclusivity (tools should cater to different learning needs), transparency (how an AI is making recommendations should be explainable), and privacy are part of the Dutch education discourse. EdTech that aligns with these values is more likely to gain acceptance. For instance, an adaptive practice app that helps struggling readers *without* stigmatising them and protects their data will resonate far better than a flashy tool with unclear algorithms or one that might widen achievement gaps.

Institutional support structures

The Netherlands has a number of intermediary organisations and public bodies that act as support structures for EdTech adoption. Kennisnet, a publicly funded EdTech expertise centre, provides research, practical guides, and IT services to schools. For example, Kennisnet publishes an annual "Trendrapport" on technology in education and guidelines on topics like AI in the classroom or cybersecurity. It also runs the Entree Federatie (SSO) and has a team that negotiates with vendors on data & security (the Privacy Covenant for education). Schools often look to Kennisnet for objective advice on EdTech issues, which in turn means EdTech entrepreneurs should be aware of Kennisnet's frameworks and recommendations.

Another key player is SIVON, the cooperative of school boards for collectively purchasing IT and negotiating contracts. SIVON not only can achieve volume discounts for schools, but increasingly it's leveraging its position to include innovation-friendly terms in contracts (like ensuring APIs are available, or that there's an evaluation period for new tools). If SIVON, for example, creates a procurement vehicle specifically for innovative tools, it could greatly ease market entry for startups.

Additionally, the government funds research-practice partnerships (e.g., NRO) where universities work with schools on evaluating new educational interventions, including tech. These create evidence that, if positive, can persuade more schools to adopt the innovation.

Policy-wise, the Ministry has signalled support for EdTech through the National Growth Fund projects and by joining international initiatives (the European Digital Education Action Plan, etc.). However, officials are also careful to emphasise that EdTech is a means to an end (better education), not an end in itself. In 2023 parliamentary debates, for instance, the education minister stated that EdTech must serve to reduce teacher workload or improve basic skills, aligning with national priorities like tackling learning loss and teacher shortages. This indicates that EdTech proposals framed as solving a pressing national issue are more likely to gain institutional backing than those seen as tech for tech's sake.

Looking ahead, stakeholders encouraged institutions to maintain a balance: set guardrails but enable innovation. This includes continuing to enforce interoperability and privacy baselines, while also creating *lightweight pathways* for experimentation (so a small pilot doesn't get stuck in red tape). Some suggested allocating a tiny percentage of education budgets specifically for innovation trials, with clear criteria, so that every school board has means to pilot something new each year without jeopardising core operations. Another idea was to expand ***"regulatory sandboxes"***, for example, allowing a controlled experiment of an AI tool under close supervision even if it slightly pushes current policy boundaries, to learn and then adjust policies accordingly.

Overall, interview evidence points to a common thread: **the need to align guardrails with speed.** The institutional framework should not rush headlong into EdTech but also should not be so slow or restrictive that it stifles beneficial innovation, especially given the rapid advancements in areas like AI. The challenge is creating a policy environment where trustworthy solutions can move from pilot to practice at a pace that matches technological change, without sacrificing the Dutch principles of quality, inclusiveness, and evidence-based education. This means standards and procurement rules must evolve in tandem with tech, teachers should be involved in policy pilots, and PPPs should be strengthened so that schools and entrepreneurs are co-authors of the ecosystem's development.

In the words of one stakeholder: ***"We need to tune the system so that safety and innovation grow together."*** By tuning data standards, procurement models, teacher training, and collaboration mechanisms, the Netherlands can integrate EdTech in a way that supports its core educational goals and values, rather than undermining them. The institutional and cultural context, in sum, is one that favours thoughtful, collaborative progress. With the right adjustments, it can provide a sturdy but flexible foundation for EdTech to flourish.

Strategies to strengthen the Dutch EdTech ecosystem

Having examined the status and challenges across the key domains of the Dutch EdTech entrepreneurial ecosystem, this section presents strategic recommendations to address the identified gaps and strengthen the ecosystem's overall vitality. These strategies are derived from a synthesis of the desk research, stakeholder interviews, and the validation workshop insights, and they are organised by the primary stakeholder or lever they involve, recognising that many actions require cross-collaboration. Importantly, the tone of these recommendations is intended to be policy-oriented and actionable, offering guidance for ecosystem orchestrators, entrepreneurs, educators, investors, and government actors in general.

Entrepreneurs

- **Co-create a founder playbook:** Collaborate with schools, researchers, and support organisations to develop a practical EdTech founder playbook that outlines how to validate solutions in schools, meet regulatory and privacy requirements, secure "smart" funding, and scale internationally. This shared resource should be kept current and openly accessible to guide new and existing founders.
- **Leverage scaleup programmes and hubs:** Take an active role in dedicated EdTech accelerators, incubators, and hubs that connect startups with experienced mentors, innovative schools, and academic experts. Such platforms accelerate growth by providing mentorship, facilitating research partnerships, and fostering peer learning among EdTech entrepreneurs.
- **Strengthen the founder community:** EdTech entrepreneurs should actively share knowledge, mentorship, and connections. By organising regular meetups or online communities, founders can exchange lessons learned about product development, procurement in schools, and investor engagement, building a stronger collective network and voice.
- **Demonstrate impact to fuel growth:** Focus on proving the learning impact of products through pilots and independent evaluations and use that evidence to gain the trust of schools and investors. By validating effectiveness and clearly communicating results, startups can shorten sales cycles at home and open doors to expansion abroad.
- **Engage internationally early on:** Participate in international EdTech events, networks, and research collaborations to broaden your perspective and access new opportunities. Early global engagement can attract foreign partners or investors and prepare ventures to scale beyond the Dutch market when the time is right.

Schools

- **Embrace a culture of innovation:** Dedicate time and leadership attention to experimenting with new digital learning tools that address schools' needs. For example, designate an innovation lead or team to pilot EdTech solutions focused on challenges like teacher workload or student engagement, and be prepared to scale up successful pilots school-wide.
- **Collaborate and share knowledge (coordinated via SIVON/sector networks):** Schools and school boards should actively share experiences and align where possible on pilots and procurement, while SIVON (together with PE-/VE-raad and regional alliances) can serve as the coordinating vehicle for joint learning, templates, and collective market engagement. Coordinated action reduces duplication, increases bargaining power with suppliers, and helps proven innovations spread faster across schools.
- **Partner with EdTech developers:** Treat EdTech providers as partners in problem-solving rather than just vendors. By co-developing and iterating on solutions with entrepreneurs and researchers – for instance, giving structured feedback or hosting them in classrooms – schools can ensure new products better fit their context and needs, while entrepreneurs gain valuable insights to improve their offerings.
- **Invest in teacher readiness:** Prioritise professional development so that teachers and support staff build the skills and confidence to use EdTech effectively. Training educators in both the technical and pedagogical aspects of digital tools ensures that investments in technology translate into meaningful classroom practice and avoids tools being underused due to lack of familiarity or trust.
- **Demand interoperability and openness:** When selecting learning materials and platforms, prefer solutions that adhere to open standards and can integrate with existing systems. By insisting on interoperability (for example, compatibility with standard identity management or data formats), schools can avoid vendor lock-in and maintain flexibility to adopt the best solutions over time with minimal disruption.

Government

- **Ensure a level playing field:** Strengthen market conditions by enforcing fair competition and opening up the learning materials market. This includes monitoring for anti-competitive practices (such as restrictive bundling of content and software) and supporting open standards for data and content, so that new EdTech entrants can integrate and compete on equal footing with established players.
- **Establish a national EdTech testbed:** Invest in a neutral, national testbed and validation framework to evaluate EdTech innovations for educational impact, privacy, and interoperability. By providing startups with a pathway from pilot to validated product – and by validating tools that meet quality benchmarks – the government can help schools identify proven solutions faster and with greater confidence.
- **Catalyse public–private partnerships:** Facilitate structured collaboration programmes that bring together schools, EdTech entrepreneurs, and researchers to co-create solutions for pressing educational challenges. For example, launch innovation challenges or sandbox programmes aligned with national education priorities (such as addressing learning gaps or teacher shortages) where public funding and policy support enable new solutions to be developed and tested in real classrooms with appropriate safeguards.
- **Support growth-stage funding:** Expand financial support beyond the startup phase to help successful EdTech ventures scale. This could include matching investments, targeted innovation grants, or tax incentives for growth-stage EdTech companies, as well as actively promoting Dutch EdTech successes to international investors. Such measures encourage ***"smart capital"*** influx – combining funding with expertise and networks – and help prevent promising innovations from stalling due to lack of later-stage funding.
- **Simplify procurement and adoption:** Refine regulations and procurement rules to make it easier for schools to adopt innovative tools. This might involve developing standard contract templates, raising tender thresholds for trying new solutions, or creating ***"fast-track"*** procurement mechanisms for validated EdTech products. By reducing red tape and uncertainty, the government enables schools to integrate effective EdTech more quickly, keeping pace with technological change while maintaining public oversight.

Investors

- **Build an EdTech investor network:** Join forces with other investors to deepen industry knowledge and co-investment opportunities in EdTech. Forming an investor working group or platform focused on education technology can facilitate the sharing of due diligence insights, pool expertise on the education market's dynamics, and ultimately increase confidence in backing EdTech ventures.
- **Offer smart capital, not just capital:** Approach EdTech investments as strategic partnerships. Beyond providing funding, investors should offer mentorship, industry connections, and patience in expected returns – recognising that education startups may scale on longer timelines. By actively advising portfolio companies (for example, linking founders to experienced advisors or pilot opportunities in schools), investors increase the likelihood of sustainable growth and impact.
- **Leverage public support and de-risking measures:** Take advantage of public-private co-financing programmes, innovation loans, or incubator partnerships to share risks and learn more about the EdTech domain. Collaborating with government initiatives – such as matching fund schemes or regional development programmes – can reduce downside risk and encourage more capital flow into the sector. It also signals confidence to foreign investors, helping attract international venture capital to Dutch EdTech startups.
- **Showcase success stories:** Highlight the successes of Dutch EdTech companies to demonstrate the sector's potential. By publicly celebrating positive exits, growth milestones, and impact achievements (through case studies, events, or media), investors not only validate their own efforts but also draw in new investors to the ecosystem. A stronger narrative around EdTech success will increase deal flow and valuations, benefiting both investors and entrepreneurs.

Intermediaries

(Public agencies, industry groups, and ecosystem support organisations)

- **Orchestrate connectivity in the ecosystem:** Act as neutral conveners by bringing together founders, schools, researchers, and investors in structured forums. Regular roundtables, demo days, or online platforms can break down silos between education and innovation, allowing stakeholders to exchange needs and solutions. By providing up-to-date overviews of ***"who is who"*** in Dutch EdTech, intermediaries ensure support doesn't depend solely on personal networks and that all players can find partners and resources efficiently.
- **Advance interoperability standards:** Continue developing and promoting national standards (like Edu-V and related frameworks) for data exchange, digital identities, and content integration in education. By working with schools and vendors to adopt these open standards, intermediaries such as Kennisnet or SIVON lower switching costs for schools and enable new EdTech tools to plug into classrooms seamlessly. This work should balance innovation with compliance, so that raising the technical bar for security and privacy does not unintentionally shut out startups.
- **Provide validation and quality assurance:** Expand services that help vet and validate EdTech offerings. Intermediary organisations can run sandboxes or evaluation programmes where educators and experts assess new tools for pedagogical effectiveness, usability, and security. Offering an independent ***"stamp of approval"*** or showcasing rigorously tested solutions gives schools confidence to try lesser known innovations and gives startups valuable credibility in the market.
- **Integrate EdTech into existing incubators and labs:** Leverage the country's network of incubators, accelerator programmes, and research labs by adding dedicated EdTech tracks or support modules. This might involve universities and regional development agencies (ROMs) creating specialised programmes for education startups or aligning existing tech initiatives with educational innovation. Such efforts ensure that EdTech entrepreneurs across all regions have access to tailored guidance, resources, and pilot opportunities.
- **Foster collaborative innovation projects:** Use convening power to encourage joint projects between incumbents and newcomers – for example, a pilot where a traditional publisher, a tech startup, and a group of schools develop a new digital product together. By facilitating these cross-sector collaborations, intermediaries can build trust and showcase how partnerships (rather than strict competition) can generate solutions that benefit educators and learners while also aligning with public values and standards.

Publishers

- **Adopt open and flexible integration:** Embrace open standards and interoperability in digital learning platforms so that external EdTech tools and content can plug in easily. By making systems more compatible with third-party solutions (for example, using standard APIs and single sign-on frameworks), burdens on schools are reduced and educators are committed to a choice – all while remaining a central content provider in a more modular ecosystem.

- **Partner to drive innovation:** Actively collaborate with EdTech startups, research institutes, or teachers' groups to develop new offerings rather than building everything in-house. This could mean investing in promising EdTech companies, co-designing pilot projects with schools, or integrating cutting-edge technologies (like AI-driven tutoring or personalised learning features) licensed from innovators. Such partnerships allow publishers to stay at the forefront of educational innovation and share in the success of new solutions.

- **Ensure fair and transparent practices:** Build trust with schools and regulators by keeping pricing and product offerings transparent. Avoid rigid bundling of content and software that locks schools in; instead, offer modular options so that customers pay for what they truly need. By demonstrating fair business practices and a focus on educational value over exclusivity, publishers can improve their reputation and reduce friction with those advocating for a more open market.

- **Co-create with educators:** Involve teachers and school leaders early in the development of new learning materials and platforms. Establish educator advisory boards or beta-testing groups to gather feedback and ideas throughout your product development cycle. By co-creating solutions with the end-users in mind, publishers can produce resources that better meet classroom needs and complement instructional practices, strengthening their relevance in a changing educational landscape.

Methodology

This research adopted a phased, mixed-methods approach to build a comprehensive and forward-looking understanding of the Dutch EdTech entrepreneurial ecosystem. The methodology combined extensive desk research with in-depth fieldwork (interviews and a stakeholder workshop), following a structured framework to analyse the EdTech ecosystem. Below we outline the key aspects of data collection, analysis, and validation, as well as considerations of data quality and limitations.

Data collection and analysis

Desk research

We began by reviewing a wide range of literature and secondary sources relevant to the EdTech sector in the Netherlands and internationally. This included academic articles on entrepreneurial ecosystems, industry reports (such as the Dutch EdTech Foundation's ecosystem studies and Brighteye's funding reports), policy documents (e.g. from the Ministry of Education and Kennisnet), and news articles. The desk research provided a baseline overview of the ecosystem's structure and status – for example, data on funding volumes, number of startups, adoption patterns in schools, and broader economic or policy trends. We used these insights to map out the six domains of the ecosystem (Capital, Market, Talent, Supporting Industries, Entrepreneurs, and Institutional Context) based on ECE's framework inspired by Isenberg (2011), and to identify initial hypotheses about strengths and weaknesses. All insights from literature were carefully noted along with APA-style references to their sources.

Stakeholder interviews

Next, we conducted semi-structured interviews with 15 key stakeholders across different roles in the EdTech ecosystem, including EdTech entrepreneurs, investors, educators (teachers and school leaders), publishers, and ecosystem experts from support organisations. Interviewees were selected to represent each domain of the ecosystem and to provide diverse perspectives – we ensured, for example, that we spoke to representatives from both primary and secondary education, startup founders at different stages, and so on. The interviews (typically 45–60 minutes each) followed a guide aligned to the six domains but allowed flexibility for stakeholders to raise what they felt was important. We asked about their experiences, perceived barriers, successful approaches, and suggestions for improvement. With consent, the interviews were recorded and transcribed for accuracy. We then performed thematic coding on the transcripts using qualitative analysis software. This involved tagging segments of text with codes corresponding to emerging themes such as challenges (e.g. ***"access to growth capital"***), enablers (e.g. ***"peer learning among founders"***), and ecosystem dynamics (e.g. ***PPP*** or ***"conservative school culture"***). The codebook was iteratively refined as new themes emerged. Through this coding process, patterns were identified – for instance, recurrent mentions of long procurement cycles or the importance of evidence in winning school trust – and these were mapped to the relevant domain(s) of the framework.

Stakeholder validation workshop

In parallel with our analysis of the interviews, we hosted a stakeholder validation workshop to verify and enrich our findings. We invited a group of about 20 stakeholders, including many of the interviewees as well as additional participants from NOLAI's network, ensuring a mix of roles similar to the interview sample. This focus-group style session was structured around the six ecosystem domains. Participants were divided into breakout groups by domain, where they reviewed a draft summary of the desk research and interview findings for that domain. They then discussed whether these findings resonated with their experiences and contributed additional reflections or recommendations. Participants (both those in-person and joining virtually) used digital post-it notes to capture their key points for each domain. The outputs from this workshop – notes, feedback summaries, and plenary discussion points – were collected as an additional data source. We analysed these outputs to test and refine our interpretations from the prior phases. For instance, if interviews suggested a certain barrier but workshop attendees disagreed or added nuance, we adjusted our analysis to account for that input. In many cases, the workshop also provided concrete examples and ideas in the stakeholders' own words (***"Schools want to see proof before buying," "Set up a dedicated EdTech fund,"*** etc.), which we have integrated as evidence in this report alongside the interview quotes and literature. This participatory validation step ensured that our conclusions were not solely researcher-driven but had a degree of ***"member checking"*** – stakeholders could challenge or confirm the preliminary findings, improving the validity of our results.

Quantitative mapping

Additionally, as part of understanding the ecosystem's structure, we compiled a database of Dutch EdTech stakeholders using data from Dealroom and other sources. We filtered for companies headquartered in the Netherlands with an educational technology focus, then manually categorised each into one or more of the six domains of the ecosystem framework. This mapping helped visualise the ecosystem's composition and provided basic quantitative context (e.g. roughly how many EdTech startups exist in the K-12 segment, how many investors are active). In addition to the Dealroom data, we cross-referenced two separate lists of Dutch EdTech companies kindly provided by the Dutch EdTech Foundation and NOLAI, using these to verify and complement the company list obtained from Dealroom. This process ensured that our quantitative picture of the ecosystem was as complete and up to date as possible, and it informed our analysis by indicating, for example, which sub-sectors are most populated or where there might be gaps (such as fewer players in certain niche markets).

Integration of findings

Using an established entrepreneurial ecosystem framework (Isenberg, 2011) as a guide, we then integrated evidence from all sources under each of the six domains. Desk research provided context and comparative data, the interviews and workshop offered qualitative insights and memorable quotes, and the quantitative mapping added a sense of scale and proportion. We synthesised these inputs by looking for common denominators – issues that appeared in both the literature and multiple stakeholder testimonies often signalled especially robust findings. At the same time, we paid attention to areas where written sources and practitioners' opinions diverged; such discrepancies are noted in the report as points of reflection. For instance, if a policy document praised a certain initiative but many interviewees said it wasn't effective on the ground, we explored the reasons for that gap in perception. This integrative analysis was careful to preserve attributions: stakeholder quotes are kept anonymous but labelled by their stakeholder group, and all facts or figures from documents are cited to their sources. By the end of this phase, we had a multidimensional mapping of the ecosystem's strengths, weaknesses, and dynamics, which directly informed the conclusions and recommendations of the study.

Intervention development

In phase 3, the study shifted from analysis to action by exploring potential interventions that could strengthen the Dutch EdTech ecosystem. Drawing on insights from the literature, interviews, and the stakeholder validation session, the research team identified critical leverage points where targeted interventions could address structural challenges such as gaps in later-stage funding, fragmented school procurement, and limited collaboration across stakeholder groups.

Rather than relying on a single solution, the team developed a portfolio of possible interventions tailored to different ecosystem domains. These included capacity-building initiatives for founders, new financing instruments for early- and growth-stage ventures, testbed programmes to support evidence-building in schools, and mechanisms to improve corporate-startup matchmaking. Each intervention idea was assessed in terms of feasibility and potential impact.

Data validity

To enhance credibility, multiple forms of triangulation were built into the research process. Data from literature and secondary reports were compared against findings from the interviews and the validation session. The sensemaking workshop acted as a form of member checking, enabling stakeholders to challenge or confirm preliminary findings and ensuring alignment with lived experience. Furthermore, the findings and recommendations were shared with various stakeholders within the EdTech ecosystem for review in order to make sure that they align with the reality and needs of the ecosystem. This co-creation model helped keep the inquiry focused on practical needs while grounding it in robust analytical methods.

Limitations & Reflection

While this study provides a comprehensive look at the Dutch EdTech entrepreneurial ecosystem, it is important to acknowledge its limitations and reflect on areas that were beyond our scope or difficult to capture with precision. Being transparent about these limitations helps frame the findings in the proper context and can guide future inquiry and action.

Sample and stakeholder representation

We combined desk research with interviews and a validation workshop, but the number of primary participants was necessarily limited. Classroom voices were present, yet perspectives from school boards, parents, and students of various regions were under-represented. Investor input was included, though not exhaustive across the capital spectrum. We partly mitigated these gaps by triangulating with external studies and sector reports, but future work should systematically include student/parent panels, a larger cross-section of teachers (PE and VE), and more diverse boards to capture regional variation and school-type nuances.

Reliance on self-reported data

Much of the qualitative evidence reflects stakeholders' lived experience. This is essential to understand practical barriers and behaviours, but it introduces subjectivity. Entrepreneurs can overweight external constraints (procurement, incumbents) relative to internal ones (product readiness, sales capacity); educators may generalise from particularly positive or negative implementations. We cross-checked recurring claims against secondary sources where possible, and we present striking quotes as indicative sentiments rather than literal statistics. Readers should therefore treat qualitative patterns as robust signals of perception and practice, not precise measurements.

Data availability and reliability

Granular, up-to-date quantitative data on Dutch EdTech remain scarce, and definitions vary (what counts as ***"EdTech,"*** which stages of funding, which segments of PE/VE). Venture counts and funding totals differ across sources; publisher market shares are typically inferred from secondary analyses rather than disclosed directly. Our mapping, assembled from multiple lists and manual verification, may miss very new entrants or firms at the sector's edges. The ecosystem would benefit from more open, recurring datasets (e.g., an annual registry of digital tools used by schools, adoption/satisfaction surveys, and transparent metrics on interoperability and usage).

Time contraints and dynamic context

The study captures a mid-2025 snapshot. Policy discussions (e.g., on the learning materials market), regulatory scrutiny, and fast-moving technologies (notably AI) continue to evolve. We focused on structural issues likely to persist e.g. fragmented adoption, later-stage capital gaps, and the need for clearer evidence pathways, but specific parameters (procurement practices, standards, funding instruments) may change. The recommendations should therefore be revisited periodically and adapted to new developments.

Balancing impartially and NOLAI's perspective

The research was co-produced with NOLAI and an independent partner (ECE) to safeguard objectivity. Interviews and the workshop were conducted under anonymity to encourage candour. Even so, subtle bias is possible when a convening organisation is part of the field it studies. We addressed this by grounding assertions in converging evidence, inviting external critique, and clarifying where the report reflects NOLAI's practical experience (e.g., co-creation pilots) versus broader ecosystem signals.

Diverse stakeholder perspectives

Not all stakeholders agree on the interpretation of market dynamics or the right levers for progress. Two tensions surfaced repeatedly:

- **Market structure and terminology.** Some interviewees described a highly concentrated, slow-switching market that disadvantages newcomers; others (including publishing representatives) stressed that leading firms' shares have been gradually declining as new entrants gain ground and cautioned against legally loaded terms to describe bundled offerings. We adjusted language to reflect both concentration and gradual change, and to describe bundling neutrally.

- **Policy versus market dynamics.** Some stakeholders prioritised procurement reform, standards, and public programmes (evidence/validation, testbeds) to accelerate safe adoption. Others argued that enduring innovation depends primarily on a well-functioning market, with the state's role focused on enforcement against anti-competitive conduct and lowering entry barriers rather than active orchestration. Our recommendations aim to balance these views: enable through smart guardrails and shared infrastructure, while protecting fair competition and choice.

These differences do not invalidate shared themes; rather, they highlight where continued dialogue is needed and where pilots, evaluations, and transparent data can help resolve disagreement.

Scope choices and what was out of scope

The primary lens was PE/VE. Connections to higher education and internationalisation were addressed where relevant but not analysed in depth. In some domains, e.g. Capital, K-12-specific data in the Netherlands were limited, so we also drew on broader education or tech ecosystem evidence where necessary and make this explicit where relevant. Likewise, adjacent domains (e.g., vocational education, informal learning) and emerging topics (e.g., generative AI's classroom implications, long-term data governance models) warrant dedicated follow-ups. Finally, we focused on EdTech entrepreneurship and market adoption; comprehensive pedagogical evaluations of specific tools were beyond scope.

Taken together, these limitations suggest reading the report as a grounded guide, not a final verdict. The core signals are consistent across methods: later-stage ***"smart capital"*** is thin; schools' adoption pathways are cautious and fragmented; evidence, interoperability, and trusted intermediaries matter; and coordination across actors is essential. At the same time, local context matters: what works in one board, region, or school level may require adaptation elsewhere.

To strengthen evidence and reduce uncertainty, we recommend: (1) broadening stakeholder inclusion (students, parents, rural/small boards) in future cycles; (2) instituting recurring, open datasets on adoption, interoperability, and outcomes; (3) embedding independent validation to translate pilots into decision-ready evidence; and (4) maintaining an iterative ***"test-measure-learn"*** loop so recommendations evolve with the ecosystem. In that spirit, this report is intended as a contribution to an ongoing conversation, one that will benefit from more data, more voices, and shared learning over time.

References

- Audretsch, D. B., Keilbach, M. C., & Lehmann, E. E. (2002). Entrepreneurial ecosystem and economic growth. Springer.
- Brighteye Ventures. (2025). Europe's edtech funding in 2025: State of the union. Brighteye. https://www.brighteyevc.com/insights/europes-edtech-funding-in-2025-state-of-the-union
- Brighteye Advisors. (2023). The Brighteye EdTech Funding Report 2023. https://brighteyevc.com
- Dealroom.co. (2021). The State of the Dutch Edtech Ecosystem 2021. Dealroom.co. https://app.dealroom.co/guides/the-state-of-the-dutch-edtech-ecosystem-2021
- Dienst Uitvoering Onderwijs. (2024). DUO open onderwijsdata: Openbare data en publicaties over bekostigd onderwijs in Nederland. https://duo.nl/open_onderwijsdata
- Dutch EdTech Foundation. (2021). State of the Dutch EdTech Ecosystem 2021. https://dutchedtech.com
- Dutch EdTech Foundation. (2024). State of the Dutch EdTech Ecosystem 2024. https://dutchedtech.com
- DutchNews. (2025). Schools set up non-profit publisher to win back textbook control. https://www.dutchnews.nl/2025/11/schools-set-up-non-profit-publisher-to-win-back-textbook-control/#:~:text=Neon%20%E2%80%93%20short%20for%20Nederlands,are%20involved%20in%20the%20project
- Edu-V. (n.d.). Edu-V afsprakenstelsel [Standards initiative]. https://edustandaard.nl/edu-v/ (see also OCW announcement of the Edu-V foundation: https://www.rijksoverheid.nl/documenten/kamerstukken/2025/05/21/brief-aan-de-tweede-kamer-over-oprichten-stichting-edu-v)
- EmpowerED Consortium. (2023). D2.1 Analysis of the European EdTech ecosystem. European Commission. https://empoweredproject.eu
- European Commission. (2022b). Time to act: Making EdTech a key driver in the European digital education ecosystem. https://education.ec.europa.eu
- European Innovation Council. (2025). EIC Accelerator: Funding and support. https://eic.ec.europa.eu
- European Investment Bank Group & European Investment Fund. (2024). European Tech Champions Initiative (ETCI). https://www.eif.org/what_we_do/resources/etci
- HolonIQ. (2025). Europe EdTech 200: 2025. https://www.holoniq.com/notes/2025-europe-edtech-200
- Isenberg, D. J. (2011). The entrepreneurship ecosystem strategy for economic growth. Harvard Business Review Press.
- Kennisnet. (2023). NL country case study: Digital learning materials market. https://kennisnet.nl
- Mirjam de Rijk. (2024). Gekaapt door het kapitaal (Captured by Capital).
- Nationaal Groeifonds. (n.d.). Digitaliseringsimpuls Onderwijs (Npuls). https://www.nationaalgroeifonds.nl/projecten/digitaliseringsimpuls-onderwijs-npuls
- NOLAI. (2023). NOLAI opschalingsplan: Naar een duurzaam innovatie-ecosysteem voor AI in het funderend onderwijs. https://nolai.nl
- Reuters. (2025, February 12). Dutch prime minister promises action to help tech startups thrive. Reuters. https://www.reuters.com/technology/dutch-prime-minister-promises-action-help-tech-startups-thrive-2025-02-12/
- SIVON. (2025, February 6). ACM start onderzoek naar werking van (digitale) leermiddelenmarkt (ACM starts investigation into the functioning of the (digital) learning materials market). SIVON News. https://sivon.nl
- Stibbe. (2025, February 6). The ACM hits the ground running in its 2025 priorities. Lexology. https://www.lexology.com/library/detail.aspx?g=cc2c086a-6cb0-42fa-9683-52ea4a7ef784
- Techleap.nl. (2024, March 1). State of Dutch Tech Report 2024. https://techleap.nl/report/state-of-dutch-tech-report-2024/
- Techleap.nl. (2025, February 12). State of Dutch Tech Report 2025. https://techleap.nl/report/state-of-dutch-tech-report-2025/
- Tweede Kamer der Staten-Generaal. (2025, June 17). Verslag van een commissiedebat, gehouden op 3 april 2025, over digitalisering en leermiddelen in het funderend onderwijs (Kamerstuk 32 034, nr. 68).
- VO-Raad. (2025, April 3). Tweede Kamer eensgezind kritisch over de leermiddelenmarkt (Dutch Parliament unanimously critical of the learning materials market). VO-Raad News. https://www.vo-raad.nl

Contributors

Dr. Ting Mu
Researcher | Erasmus Centre for Entrepreneurship

Jip Dresia
Education & International Partnerships Lead | Erasmus Centre for Entrepreneurship

Dr. Ferdinand Jaspers
Programme Director & Adjunct Professor in Entrepreneurship | Erasmus Centre for Entrepreneurship

Garance Vanonckelen
Visual Communication Specialist | Erasmus Centre for Entrepreneurship

Katty Hsu
Research & Inclusive Enptrepreneurship Lead | Erasmus Centre for Entrepreneurship

Loes Gast
Project Manager | Erasmus Centre for Entrepreneurship

Wanisha Bhoelai
Junior Researcher | Erasmus Centre for Entrepreneurship

Ata Engin
Innovation Project Manager | Erasmus Centre for Entrepreneurship

Dr. Kim Brandes
Director Co-creation | National Education Lab AI (NOLAI), Radboud University

Dr. Inge Volman
Lead Business & Innovation | National Education Lab AI (NOLAI), Radboud University

Karcie Snoeijen
Projectlead Business & Innovation | National Education Lab AI (NOLAI), Radboud University

We would also like to acknowledge and sincerely thank everyone who has contributed to this report. First of course, everyone who contributed as interviewee. Among these are (excluding those who would like to remain anonymous): Roel Bakker (Director, Cito bv.), Rutger Peters (Founder & CEO, Gynzy), Youssef El Bouhassani (Co-founder, Leerlevels), Patrick Eckringa (Chairman of the board of directors, Veluwse Onderwijsgroep), Stephan de Valk (Director, MEVW), Willem-Jan van Elk (Strategic advisor, Kennisnet and SIVON). We would also like to thank Martijn Luijks for project management and coordination.

Second, we would like to thank all partners of the Edtech Ecosystem pilot who participated in the research validation workshop. Your input and insights have been of vital importance to validate the findings and form strategic recommendations in this report.

Third, many people from regional development agencies, other growth fund programmes, knowledge- and branch organisations, NOLAI and ECE itself reviewed a version of the report. Lastly, many thanks for Tess Lasschuit for the Dutch translation and Jimmy Israël for the drawings.

Thank you all for your time and valuable input.

Building a Future-Proof EdTech Ecosystem

Insights and Strategies for Scaling Evidence-Based Innovation in Dutch K-12

Erasmus Centre for Entrepreneurship

NOLAI
NATIONAAL ONDERWIJSLAB AI