Erasmus Centre for Entrepreneurship

NOLAI

Summary: Building a Future-Proof EdTech Ecosystem

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

Why this report, and why now?

Digital technology has been part of Dutch education for decades, but recent advances in AI mark a qualitative shift. AI-driven tools increasingly influence learning processes, assessment, data flows and teacher workload. This raises new questions about quality, interoperability, governance, privacy and public values in primary and secondary education.

In this context, the Dutch EdTech ecosystem plays a crucial role. It consists of schools and educators, EdTech companies and publishers, researchers, intermediaries, investors and public authorities. The quality of interaction among these actors determines the ecosystem's effectiveness. While the Netherlands has strong ingredients for educational innovation, persistent bottlenecks prevent many promising solutions from moving beyond pilots into sustained, system-wide impact.

This moment is particularly urgent because several developments converge:

- **Market pressure:** an ACM investigation (2025) signals potential market failures in the learning-materials market.
- **Technical foundations:** initiatives such as Edu-V and Entree Federation are laying the groundwork for interoperability and open standards.
- **Regulation:** the EU AI Act (2024) introduces stricter requirements for high-risk AI systems in education.

Together, these developments make clear that incremental change is no longer sufficient. The ecosystem itself must mature.

Purpose and approach of the study

The report **'Building a Future-Proof EdTech Ecosystem'** was commissioned by NOLAI to better understand how the Dutch EdTech ecosystem currently functions, where it stalls, and what is needed to move from fragmented innovation to evidence-based impact at scale.

The study is based on:

- desk research
- 15 stakeholder interviews
- validation workshop with 20 experts from across education, industry, research and public organisations

The analysis applies an ecosystem perspective, distinguishing six interrelated domains that together determine whether innovation can move from pilot to adoption and scale. This lens does not focus on individual technologies, but on the structural conditions that enable or hinder progress.

The ecosystem at a glance

Potential

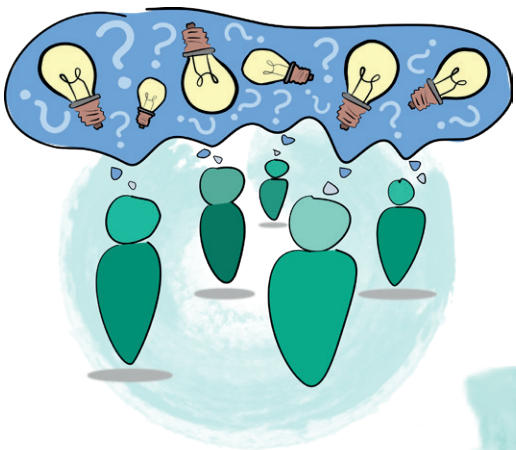
"2.5 million learners in primary and secondary education, accelerating AI capabilities, and emerging co-creation practices between schools, developers and researchers."

Core challenges

"A persistent growth-capital gap, strong market concentration, vendor lock-in, and fragmented coordination across actors."

Central insight

"The ecosystem does not primarily fail due to a lack of ideas or initiatives, but because promising innovations get stuck between trial and large-scale adoption."



Six domains, six structural bottlenecks

The report applies an ecosystem framework originating in entrepreneurship research, adapted to the context of K-12 education, to analyse how educational innovation emerges, is adopted and scales across six interconnected domains.

Capital: a scale-up gap

Early-stage funding for Dutch EdTech startups has improved, through public grants, angel investors and seed capital. However, the report identifies a clear bottleneck at later stages:

> *"Later-stage cheques are scarce, and many Series A/B deals fall through late in the process."*

Long sales cycles in K-12 education (often 12–24 months), a relatively small domestic market and limited large exits make EdTech appear riskier to investors than other tech sectors. As a result, many promising companies seek growth capital abroad, reducing long-term Dutch influence over their direction.

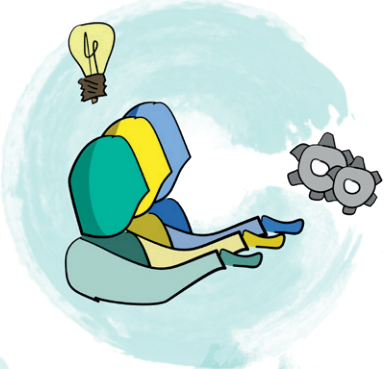
Market: concentration and friction

The Dutch K-12 market is sizeable but highly decentralised, with thousands of schools making local decisions. At the same time:

> *"Around 80% of the learning-materials market is controlled by four publishers."*

Increasing bundling of content with digital platforms creates vendor lock-in — limited ability for schools to switch tools — and raises barriers for new entrants. Although interoperability initiatives are starting to reduce switching costs, the market remains slow and high-friction. A key consequence is that:

> *"Many pilots die in the 'valley between trial and scale', failing to progress to school-wide or national adoption."*



Talent & knowledge: hybrid profiles are scarce
The Netherlands has strong education and technology talent, but the ecosystem lacks enough hybrid profiles — people who combine pedagogical understanding, technological expertise and commercial skills. The report notes that many teams lean heavily either:

- education-first (strong classroom alignment, weak scaling capacity), or
- tech-first (innovative solutions, limited fit with school realities).

This imbalance slows both adoption and growth.

Publishers and platforms: infrastructure and gatekeepers
Publishers and large education platforms play a dual role. They provide essential infrastructure, content and distribution, but their dominant position can also limit innovation if access is closed or integration is difficult. The report finds that:

> *"Open integrations and fair, modular partnerships remain the exception rather than the norm."*

Public standards and regulatory pressure are beginning to shift this balance, but practical implementation remains uneven.

Entrepreneurs: mission-driven, scaling-constrained
Dutch EdTech founders are typically highly mission-driven and motivated by educational impact rather than quick exits. The community is becoming more connected, with peer learning and mentoring increasing. Many entrepreneurs struggle with:

- navigating procurement and compliance
- building robust evidence of impact
- and preparing for international scaling

Without more structured support, strong pilots remain isolated successes.

Institutional context & coordination: many actors, unclear facilitation
Dutch ecosystem includes numerous public and intermediary organisations (e.g. Kennisnet, SIVON, sector councils, ROMs). While this reflects a rich landscape, it also leads to fragmentation. Stakeholders consistently point to:

"The need for a clearer neutral facilitation structure shared across public actors, rather than a single central orchestrator."

Coordination, not control, is the missing ingredient.

Key implications and action directions

Based on these findings, the report identifies five interlinked directions for strengthening the ecosystem:

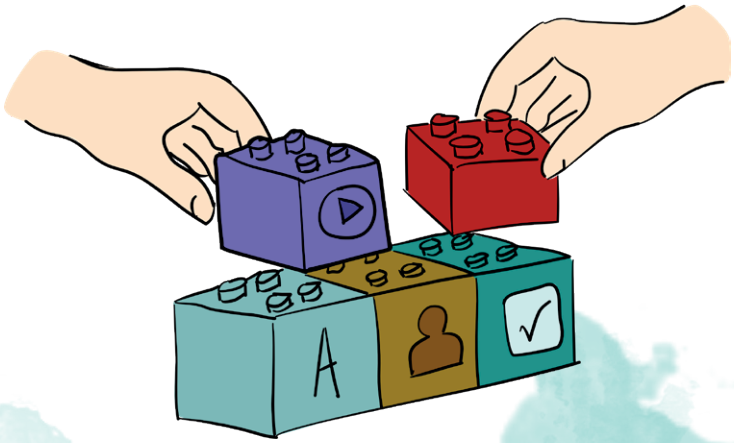
1. **Capital**
   Address the growth-capital gap by enabling later-stage cheques with patient, sector-savvy capital.

2. **Market access & validation**
   Develop an independent testbed framework that offers a trusted route from pilot to adoption, validating effectiveness, privacy and interoperability.

3. **Knowledge sharing**
   Invest in ecosystem-wide learning through founder playbooks, peer learning, mentorship and stronger involvement of teachers in development and evaluation. Co-creation is essential for successful adoption.

4. **Interoperability & openness**
   Accelerate implementation of open standards (e.g. Edu-V, Entree Federation, APIs) to reduce lock-in and lower entry barriers.

5. **Internationalisation**
   Support Dutch EdTech companies in navigating export markets, regulation and partnerships, recognising that the domestic market alone is too small for sustainable scale.



Conclusion: from potential to impact

The Dutch EdTech ecosystem has strong foundations: quality-focused schools, engaged educators, mission-driven entrepreneurs and growing policy attention. What is missing is not ambition, but alignment.

Without coordinated action, the Netherlands risks becoming an "EdTech nursery", where innovation emerges locally but matures elsewhere. With the right conditions, however, the ecosystem can move from fragmented experimentation to sustainable, evidence-based impact.

This report provides a shared diagnosis and a basis for action. It is not an endpoint, but a starting point for collective learning and coordinated progress.