

# State of Al in The Netherlands Igniting Europe's Hidden Al Powerhouse

July 2025

### Introduction

## AI poses a generational opportunity for wealth creation

Al is advancing at an **exponential pace**. Some experts predict we will soon see the arrival of **AGI** / **superintelligent systems** 

Al is **rewiring the economy**: value will shifts from labor to models

The disruptive effects are already felt in software companies. Others will follow shortly Future wealth creation depends on being an 'AI shaper' or 'AI taker'

AI-driven productivity gains will be distributed **highly unequally** 

The **US and China** are investing billions to secure AI dominance

Future health of the **Dutch economy** depends on its ability to harness AI's potential

#### Key questions to resolve

How does the **Dutch AI ecosystem** compare to other leading European clusters?

What unique **strengths** and **challenges** define its position?

How can the Netherlands chart its **own** course to thrive in this new era of AI?

### **Executive Summary**

## One of the deepest AI talent pools in Europe

The Netherlands accounts for 8% of the total AI talent pool in Europe, compared to just 2.4% of the population (~3x more).

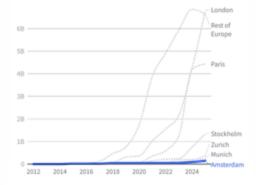
#### Number of AI Talents in NL versus peers

Country	Al Talents	Al Talents share	Number of Ai Talents per 50k Capita -	848
Luxembourg	768	0%	12.5	1
Netherlands	18.7K	8%	10.9	17
Ireland	4.5K	2%	9.4	5
Switzerland	7.6K	3%	9.0	8
Denmark	4.5K	2%	1.7	6
Cyprus	609	0%	7.0	1
United Kingdom	40.5K	18%	6.2	66
Sweden	5.8K	3%	5.2	30
France	36.4K	16%	5.6	67
Finland	3K	1%	5.6	6
Malta	242	0%	5.0	0
Norway	2.6K	1%	4.0	5
Portugal	4.8K	2%	4.7	20
Germany	35.6K	16%	4.3	13
Spain	20.3K	9%	4.3	47

## A talent magnet without propulsion

While AI startup activity in other major European cities (Paris, London, Zurich) accelerates, Amsterdam lacks the same escape velocity.

Amsterdam enterprise value compared to other major European hubs



## Need for capital and a scientific impulse

The main AI hub, Amsterdam, trails other European cities in (Growth) Capital, and lacks a brand name academic institution or major global Tech R&D center.

Ranking of Amsterdam on key performance indicators



### prosus

#### Investing in the AI-enabled Future of Commerce.

Prosus is a global technology company, unlocking an AI first world for its 2 billion customers. With investments in more than 100 companies across the world, Prosus builds local ecommerce champions in growth markets.

With leading positions in Food Delivery, Classifieds and Fintech, Prosus has created its own unique technology ecosystem, driving innovation, knowledge sharing and growth across its portfolio.

Through the Prosus Ventures team, the Group invests in new technology growth opportunities within AI, social and ecommerce platforms, fintech, B2B software, logistics, health, blockchain, agriculture and more.

The team actively backs exceptional entrepreneurs who are using technology to improve people's everyday lives.

## techleap.пl

## Positioning the Netherlands as a leading global Tech hub

Techleap is a Dutch organization dedicated to empowering founders to accelerate their ventures, fostering economic growth and societal progress. Our mission is to position the Netherlands as a leading global hub for tech entrepreneurship across all critical sectors and technologies.

Founded with support from the Dutch government, Techleap recognizes the crucial role of technology in driving innovation. Over time, a vibrant grassroots community has emerged, where founders take ownership and actively support one another.

From initial government support to a thriving independent community, Techleap helps create a self-sustaining Dutch entrepreneurial flywheel that continues to propel innovation and development.



## Global startup & venture capital intelligence platform

Dealroom.co is a global intelligence platform for discovering and tracking the most promising companies, technologies and ecosystems. Clients indude many of the world's foremost organizations such as Sequoia, Accel, Index Ventures, McKinsey, BCG, Deloitte, Google, AWS, Microsoft, Stripe.

Dealroom partners closely with local tech ecosystem development agencies and enablers, to create a comprehensive multi-dimensional blueprint of the tech ecosystem, including capital, talent, innovation, entrepreneurship and overall economic dynamism.



## "The Netherlands has the foundations to become an 'AI maker, not an AI taker.'

With high-income consumers, brilliant founders, and an abundance of talent, the country is uniquely positioned to lead in the next wave of innovation.

The Dutch ecosystem is marked by a spirit of collaboration, creativity, and resilience offering the Netherlands a genuine opportunity to shape the future of AI—not just for Europe, but for the world.

At Prosus, we are ready to do our part and help build the next generation of European AI companies. Together, we can turn today's promise into tomorrow's breakthroughs."

Fabricio Bloisi, CEO

prosus



# "The Dutch AI ecosystem is brimming with potential, but that's not enough to win.

Though we have world-class talent, a tradition of scientific excellence, a growing community of founders tackling some of society's biggest challenges, it is not coming together yet. We must raise the collective ambition, by investing boldly in startups and a more connected national AI infrastructure, like the national AI Giga Factory. The government should provide access to large public datasets and actively use its procurement muscle to stimulate innovation at scale.

Still, startups struggle to find knowledgeable buyers or sophisticated corporate partners who understand how to adopt and scale AI solutions. They note that investors miss the deep expertise to place large bets in this space. We are also leaking AI talent to big tech. Techleap will lay its part in facilitating AI founders to bring all these relevant stakeholders together in a solid AI ecosystem, which we will announce soon."

#### Constantijn van Oranje, Special Envoy

techleap.nl

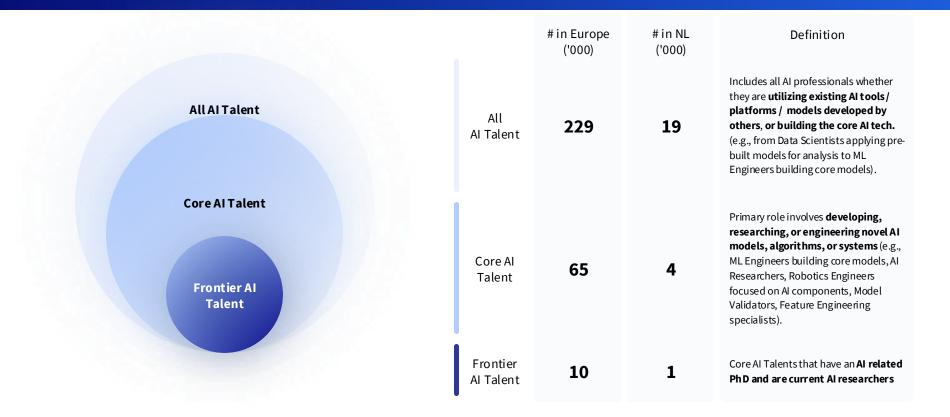
## 1. Dutch surprise: One of the deepest talent pools in Europe

2. A society that lags in AI trust and adoption

3. AI startup scene without escape velocity

4. A call for action

### The Netherlands has a deep AI Talent pool



Source: Dealroom.co; The Europe dataset is excluding Russia and Turkey.

A Frontier AI Talent is a professional currently doing AI related research, and holds a completed PhD where AI/ML was a core component. This includes degrees in fields like CS, AI, Stats, Data Science, or any domain (e.g., computational biology, physics, economics) if their doctoral research heavily utilized or developed AI methods.

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Country	AI Talents	AI Talents share	Number of AI Talents per 10k Capita -
Netherlands	18.7K	8%	10.9
Ireland	4.5K	2%	9,4
Switzerland	7.6K	3%	9.0
Denmark	4.5K	2%	7.7
United Kingdom	40.9K	18%	6.2
Sweden	5.8K	3%	5.7
France	36.4K	16%	5.4
Finland	ЗК	1%	5.4
Portugal	4.8K	2%	4.7
Germany	35.6K	16%	4.3
Spain	20.3K	9%	4.3
Europe	229.5K	100%	3.8
Belgium	4.1K	2%	3.6
Austria	2.7K	1%	3.1
Poland	8.8K	4%	2.3
Italy	12K	5% dditional 17 rows not shown	2.0

# An unexpected surprise:

The Netherlands has the most dense AI talent pool in Europe.

This accounts for 8% of the total AI talent pool in Europe, compared to just 2.8% of the population (~3x more).

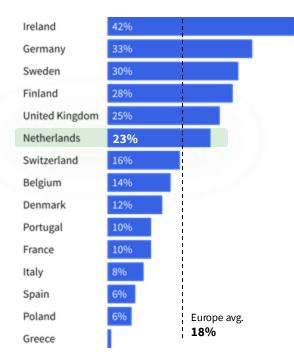
## Netherlands is one of Europe's main magnets for global AI talent

Overall Europe hosts 42k extra-European AI talents, which make up 18% of the talent pool.

Source: Dealroom.co;

Showing to p 15 European countries where most AI Talents are currently located, excluding Russia and Turkey. Country of origin are estimated using education history, early work experience, names, and languages spoken.

## Share of extra-European AI Talents per country



## Number of extra-European AI Talents per country

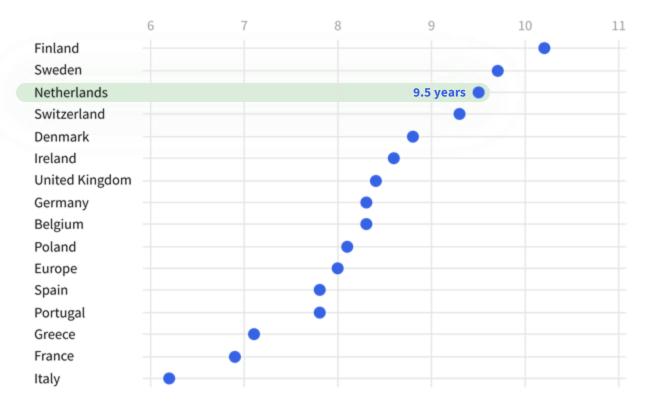
Germany	12K
United Kingdom	10K
Netherlands	4К
France	4K
Ireland	2К
Sweden	2К
Spain	1K
Switzerland	1K
Italy	972
Finland	830
Belgium	588
Denmark	556
Poland	480
Portugal	478
Greece	26

Netherlands is also one of the most experienced AI talent hubs

Source: Dealroom.co;

Includes all work experience of current AI talents in the 15 biggest AI Talents country hubs in Europe, excluding Russia and Turkey.

#### Median years of work experience of Al Talents in Europe's 15 top Al Talents countries



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## Amsterdam is the national AI hub representing 37% of the country's talents

City	AI Talents	AI Talents share in country
1 <sub>st</sub> Amsterdam	6951	37.2%
Utrecht	1988	10.7%
Eindhoven	1180	6.3%
Rotterdam	1017	5.4%
The Hague	825	4.4%
Delft	570	3.1%
Groningen	404	2.2%
Nijmegen	313	1.7%
Leiden	277	1.5%
Arnhem	230	1.2%
Tilburg	219	1.2%
The Randstad	211	1.1%
Enschede	206	1.1%
Maastricht	202	1.196
Den Haag	182	1.096

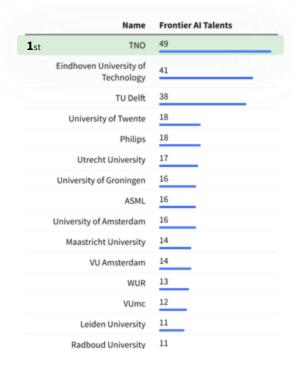


## Amsterdam is the 5th largest hub in Europe with ~7000 AI professionals

City	AI Talents	AI Talents share global
London	20K	8.7%
Paris	15K	6.6%
Berlin	8K	3.4%
Madrid	8K	3.3%
5th Amsterdam	7K	3.0%
Munich	5K	2.3%
Barcelona	5K	2.1%
Warsaw	4K	1.7%
Dublin	зк	1.4%
Stockholm	зк	1.3%
Zurich	зк	1.3%
Copenhagen	зк	1.3%
Milan	зк	1.296
Lisbon	2К	1.096
Utrecht	2К	0.9%



### TNO, Eindhoven university, and TU Delft are home to the largest pools of AI research talent





#### Source: Dealroom.co;

Page / 14 Showing city hubs with more than 10 Frontier Al Talents.

A Frontier AI Talent is a working professional currently doing AI related research, and holding a completed PhD where AI /ML was a core component.

## A top hub of Frontier AI researchers ranking #8 in Europe





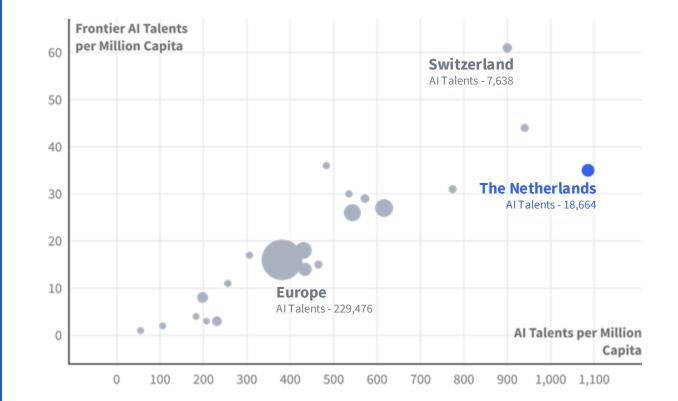
#### Source: Dealroom.co;

Page / 15 Map showing hubs with 30+ Frontier AI Talents

A Frontier Al Talent is a working professional currently doing Al related research, and holding a completed PhD where Al /ML was a core component.

## Why does this matter? Top AI talent attracts other talent

The Netherlands has double the AI Researcher density as the major European countries, yet Switzerland demonstrates it can aim even higher.



## Europe's feeder club for Silicon Valley

The Netherlands breeds frontier talent, butmany of NL best PhD-level researchers are working for US firms.

Often drawn by the exciting, cutting edge problems they can work on and the resources available to crack them.



**Durk Kingma** 



**Michiel Bakker** 



**Rick Lamers** 

#### Taco Cohen



Tijmen Blankevoort

Google

Tim Salimans



**Douwe Kiela** 





## Strong universities, no global flagship

Eindhoven University, TU Delft and others are home to frontier researchers.

Yet the main national AI hub, Amsterdam lacks a world-class academic institution and/or major global AI R&D center.

None of the European Tech giants (such as Booking and Adyen) appear as major frontier talent hubs.

#### Source: Dealroom.co;

A Frontier AI Talent is a working professional currently doing AI related research, and holding a completed PhD where AI/ML was a core component.

## Top Frontier Al universities & public research centers in Europe



## Top frontier AI private companies and labs in Europe







**32%** Tech native companies

**7%** Universities

## The packed, but parked workforce

About 70% of Dutch practitioners sit in oldeconomy or government roles.

Great for retrofitting legacy industries, but not necessarily for finding the next Google.

	Old Economy and Government	Digital Tech native companies	Universities
Italy	71%	29%	8%
Spain	70%	32%	8%
Netherlands	70%	32%	7%
Denmark	70%	30%	8%
Greece	69%	32%	9%
France	68%	35%	5%
Portugal	68%	35%	7%
Poland	67%	38%	5%
Europe	66%	35%	8%
Belgium	66%	35%	10%
Germany	65%	34%	8%
Switzerland	63%	33%	12%
Sweden	63%	37%	9%
United Kingdom	60%	38%	10%
Ireland	58%	40%	8%
Finland	58%	39%	13%

#### Where do AI talents work?

#### Source: Dealroom.co;

Showing the top 15AIT alent country hubs by number of AI Talents. The data can add up to more than 100% because people can have multiple current positions. **1. Dutch surprise: One of the deepest talent pools in Europe** 

## 2. A society that lags in AI trust and adoption

3. AI startup scene without escape velocity

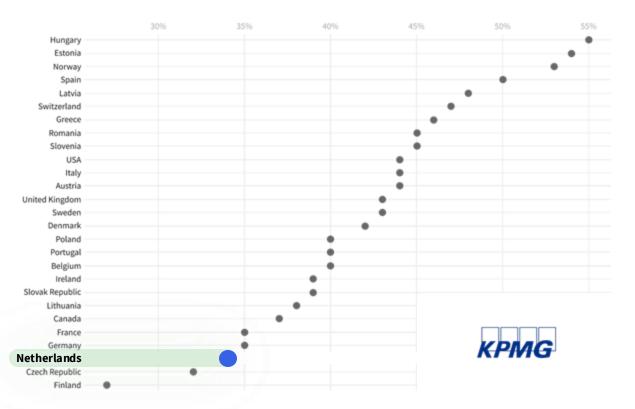
4. A call for action

Despite the large amount of AI talent, the Dutch experience an extraordinary high level of distrust in AI solutions

Source:

"Trust, attitudes and use of AI: A global study" by KPMG; Global survey with 1001-1098 respondents per country, \*% Willing to trust based on 'Somewhat willing', 'Mostly willing' and 'Completely willing'.

#### Share of respondents with Trust in AI Applications\*



### Distrust and lack of awareness results in long sales cycles and limited adoption

Source:

"Trust, attitudes and use of AI: A global study" by KPMG; "Using AI on a semi-regular basis: every few months, monthly, weekly or daily. Global survey with 1001-1098 respondents per country. Share of respondents using AI on a semi-regular basis\*

Switzerland	68%	
Portugal	63%	
Romania	62%	
Greece	61%	
Italy	60%	
Spain	60%	
Denmark	57%	
Ireland	56%	
Finland	56%	
Austria	55%	
United States of America	53%	
United Kingdom	52%	
France	51%	
Germany	51%	
Canada	50%	
Hungary	50%	
Czech Republic	49%	
Sweden	49%	KPMG
Belgium	47%	Krivig
Netherlands	43%	

#### **Co-Authors of the AI-Plan**



Jelle Prins Co-Founder



#### **Michiel Bakker**

Assistant Professor



# "

Five years ago, the Netherlands was still at the forefront. But today we are mostly using American AI models while our talent is leaving.

The Netherlands is at risk of being unable to finance our welfare state - our pensions - if our industries become dependent on US built AI.

This is the time to invest heavily to be able to control this fundamental technology."

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## The Netherlands has many AI startups

	GB UK	FR France	CHSwitzerland	DE Germany	NL Netherlands	EU Europe
N° of AI Startups	2,040	842	360	1,296	618	8,599
Total n° of Startups	23,688	11,462	3,719	13,657	6,653	94,850
AI as % of total startups	8.6%	7.3%	9.7%	9.5%	9.3%	9.1%
AI Startups/million people	29	13	39	15	36	12
	Isomorphic Laboratories	poolside	်း Cradle	MHelsing	🤹 Cradle	
Examples of AI companies	Eleven   Labs	MISTRAL AI_	UNIQUE	Taktile	MONUMENTAL	
	Light	<b>%</b> Maki			MarvelX	

## Amsterdam AI startup ecosystem is the #8 in Europe

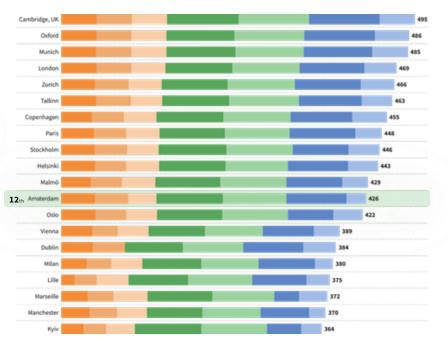
#### Ecosystem Index 2025 Top AI Champions Europe

Early Breakout Late stage EV Unicorns Funding growth Alumni Patents



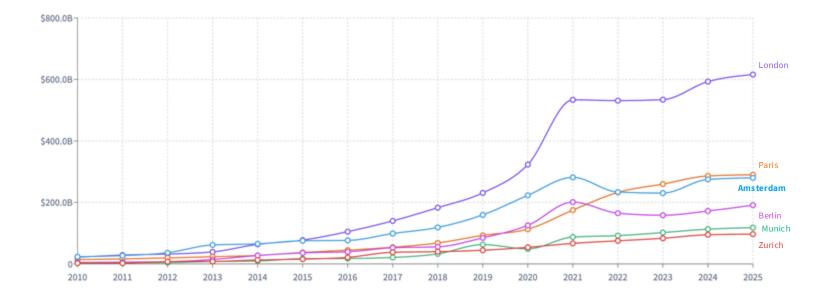
#### Ecosystem Index 2025 Top Density Leader AI Europe

#### Early Breakout Late stage EV Unicorns Alumni Patents



## Within Europe, broader Amsterdam tech ecosystem is losing momentum

Total Enterprise value of Tech Sector in key European cities, 2010-2025



## A talent magnet without startup momentum

While Agentic AI startup activity in other major European cities (Paris, London, Zurich) accelerates, Amsterdam lacks the same escape velocity.

#### London Rest of Europe 6B 5B Paris 4B3B 2B Stockholm 1B Zurich Munich Amsterdam 2012 2014 2016 2018 2020 2022 2024

#### Evolution of Agentic AI total Enterprise Value by major European cities

Source: Dealroom.co

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## The Netherlands is trailing on growth capital and scientific impuls

#### Global Tech Ecosystem Index 2025: Global Champions in AI in Europe



## Vertical bets over horizontal hype?

The Dutch ecosystem outperforms in Finance, Food and Climate/Energy. Leaning into spikes like these could help position NL as the place where boring regulated domains meet cutting edge models.

#### Position of Amsterdam in ranking of Global cities, 2025



**1. Dutch surprise: One of the deepest talent pools in Europe** 

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## The Netherlands has a great foundation to build on

#### Home of the European Tech Giants

• Home to three of the Top-6 European Tech Champions (Booking, Prosus, and ASML)

#### Education powerhouse

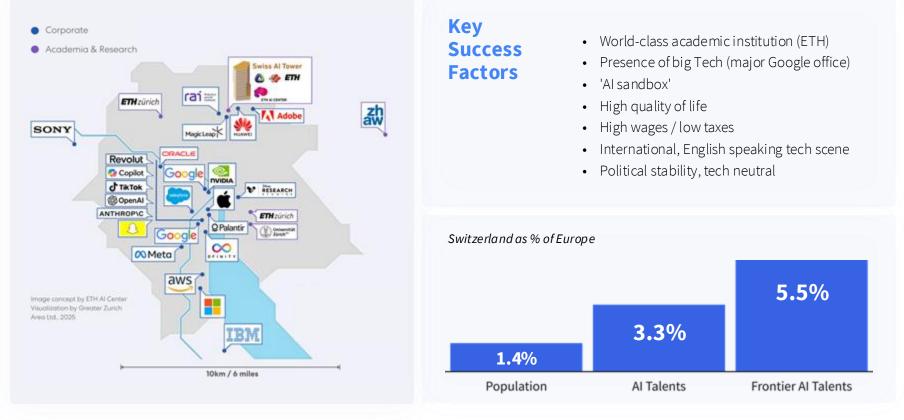
• Universities and institutions breeding Europe's Frontier AI talent

#### **Global Talent destination**

- Highest concentration of AI talent in Europe.
- One of Europe's main magnets for global AI Talent



## Learning from the best: How Zurich became a major AI powerhub



## How does Amsterdam compare with other major European AI hubs?

Key Success Factors		London	Paris	Zurich	Berlin / Munich	Amsterdam
	World-class academic institution	Oxford / Cambridge	Polytechnic	ETH	тим	
Talent	Campus style "AI Tech Hub"	London Al Hub	StationF	Swiss AI Tower	Merantix	
	Big Tech R&D center	DeepMind	Meta, Hugging Face	Google AI		
Government	Government push	++	Oxford / Cambridge			
	'Al sandbox'			+++		
	High wages / low taxes	++		+++		
Culture	High quality of life	++	++	+++	++	+++
	International / English speaking	+++		+++		+++
	Political stability, tech neutral	++	++	+++	++	++

### **Proposed action plan**

### 1

Al sovereignty: Have infrastructure to build critical systems and models independently (e.g., Al Gigafactory and clean data).

### 2

Al Hub: Launch a campus-style Al Hub in Amsterdam to concentrate talent and capital.

### 3

**Talent:** Attract more top AI talent to NL (fast visa, VC and R&D budgets) and negotiate strategic 're-imports' (joint labs, spin-outs, shared IP).

#### 4

**Growth Capital:** Local Pension funds to fill the growth capital gap.

### 5

**Big Tech:** Get (European) Big Tech companies to concentrate their R&D efforts in NL.

### 6

**Al Awareness:** Start a national campaign to accelerate the adoption of Al in Dutch society.

### 7

**Moonshots:** Launch Al XPrice for 2-4 moonshot ideas that the community can rally behind.

### 8

**Government as innovation catalyst:** Government as major procurer, Defense as a flywheel, open up public datasets.

## prosus

Our commitments to the Dutch Al ecosystem

## 1

We will build out a **Global AI Experience** in Amsterdam

3

We **seek to invest** in the local AI startup ecosystem We will grow Prosus AI team **5x in the next 2** years

We **actively contribute** to the development of the Dutch ecosystem

### Authors of this report



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Julien Puls Data Scientist at Dealroom.co



Tamara Franssen Project Manager AI & Deeptech Capital at Techleap

# Appendix



#### Other Major European Al Hubs:

Merantix Berlin

- In Germany, Merantix is a leading European AI venture studio founded in 2016 by Adrian Locher and Rasmus Rothe in Berlin.
- It builds and scales AI-native startups by combining technical research with entrepreneurial execution.
- The organization operates through Merantix Capital (investment), Merantix Momentum (AI consulting), and the Merantix AI Campus, a major Berlin hub hosting 1,300+ community members.

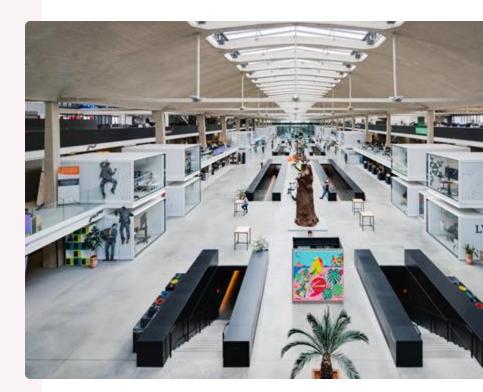


## STATION F

## Other Major European Al Hubs:

Station F in Paris

- Station F, launched in 2017 by entrepreneur Xavier Niel, is the world's largest startup campus, located in Paris.
- Spanning 34,000 m<sup>2</sup> and hosting over 1,000 startups at a time, it serves as a hub for innovation across tech sectors, with artificial intelligence playing a central role.
- The campus features more than 30 startup programs and deep integration with corporate partners like Microsoft, Amazon, Meta, Apple, and Google.
- Al has become increasingly prominent at Station F with 34 of the 40 companies in its 2024 "Future 40" cohort being Al-driven.
- Several key AI initiatives are anchored at Station F. Meta, Hugging Face, and Scaleway run a joint European AI Startup Program, offering selected scale-ups access to compute resources, mentorship, and technical infrastructure.

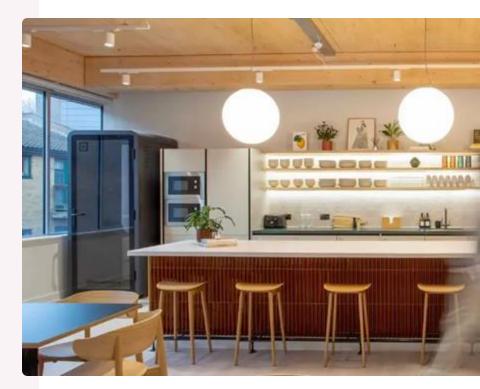




## Other Major European Al Hubs:

London Al Hub in London

- The London AI Hub, opened in February 2025 in Farringdon, is a new initiative from Tech Nation in partnership with Merantix, Husayn Kassai (founder of Onfido and Quench.ai).
- Located at a flagship site on Goswell Road, the 6,000 ft<sup>2</sup> hub is modeled after global AI spaces like Station F in Paris and the Merantix AI Campus in Berlin.
- The hub is designed to support the UK's growing AI ecosystem, which includes over 1,300 AI-focused companies and a workforce of around 360,000.
- It provides high-quality co-working space, a curated program of events, and serves as a focal point for collaboration across startups, corporates, academia, and government.
- The mission is to foster responsible AI development and bring together stakeholders from across sectors to drive innovation and growth.



#### Other Major European Al Hubs:

#### AI Sweden in Stockholm

- Al Sweden, launched in 2019, is Sweden's non-profit national centre for applied artificial intelligence, hosted by Lindholmen Science Park
- Its mission is to accelerate AI adoption across society, business, and public services.
- Funded primarily by Vinnova, the Swedish Agency for Economic and Regional Growth, the European Regional Development Fund, municipalities, regions, and over 160 private, public, and academic partners.
- AI Sweden operates through various programmes:
- Al Labs (in Gothenburg and elsewhere) facilitate prototyping and co-development in areas like edge learning, security, satellite applications, and healthcare
- Sector initiatives, such as "Information-driven healthcare," aim to integrate AI into Swedish healthcare in partnership with organizations like Unity Health Toronto
- A Startup Program supports SMEs and scale-ups in three acceleration stages



## **TH**zürich

### **Other Major European Al Hubs:** ETH Zurich

- The ETH AI Center at ETH Zurich was launched in 2020.
- The center brings together more than 1,500 researchers and over 110 professors from 16 ETH departments, fostering collaboration across fields such as computer science, engineering, health, robotics, and ethics.
- Its mission is to advance trustworthy and inclusive AI that addresses real-world problems.
- The center runs a dedicated fellowship program, which by the end of 2023 supported nearly 60 PhD and postdoctoral researchers working on cross-disciplinary AI projects.
- ETH Zurich also supports startup creation—37 startups were spun off in 2024 alone, around 10 of which were Al-driven, including Terensis in precision agriculture.
- Entrepreneurship is further supported through the AI Launchpad, a program that provides mentorship and industry connections for AI startups. ETH collaborates with companies such as DFINITY Foundation, MAN Energy Solutions, and Creative Dock on AI projects, particularly in energy, blockchain, and automation.
- The center also plays a key role in Switzerland's AI strategy as co-founder of the Swiss National AI Institute (SNAI) and is home to the Zurich unit of ELLIS, the European Lab for Learning and Intelligent Systems.





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