Dutch Edtech



The State of the Dutch EdTech Ecosystem



October 2025

Connecting the EdTech community nationwide to accelerate learning and education innovation

Why this report

The strength of the Dutch knowledge economy depends on our collective capacity to learn. Only by expanding that capacity can we successfully navigate today's major transitions. EdTech plays a pivotal role: it drives learning innovation, expands our knowledge base, and secures the future strength of the Dutch economy.

Are we building enough momentum for startups to scale?

This is a critical challenge for the sector. Without a strong EdTech ecosystem, the Netherlands risks losing both innovation power and digital sovereignty. Dominant global tech players are making a massive push into education with AI and other technologies. If we don't strengthen our own ecosystem, we risk becoming overly dependent on them - losing influence over how we learn, work, and develop.

By investing in our own strength, we can position ourselves as a strong partner in European and global collaboration.

Every societal transition, whether in healthcare, energy, or the labor market, is fundamentally a learning transition. EdTech provides the essential infrastructure that makes learning accessible, adaptive, and scalable.

This report is therefore more than just numbers. It sends a strong message: the Netherlands must act now to invest in a resilient EdTech ecosystem. With the right conditions, the Netherlands has the right launchpad for entrepreneurs to deliver real impact at scale. **But they need a fair chance!**





EWOUD de KOK

Chairman Board
Dutch Edtech Foundation

CEO / Founder
FeedbackFruits



JITSKE van OS

Managing Director
Dutch Edtech Foundation

Executive summary.

1 The Dutch EdTech sector shows a strong growth & maturity.

The Dutch EdTech sector has quadrupled in five years, reaching nearly $2 billion in market value. The number of companies grew by +20% to over 500, and jobs expanded by +18% to 13,400 FTEs. EdTech has moved from hype to becoming a sustainable pillar of the Dutch knowledge economy.

2 Lifelong Learning is the growth engine of the sector.

Over half of Dutch EdTech companies focus on lifelong learning and higher education. These segments dominate in scale, employment, and innovation, while primary and secondary education remain fragmented and small-scale.

3 Companies face structural barriers to scaling.

Despite a dense ecosystem, no new OECD/EU-defined scaleups have emerged. Startups struggle mainly with go-to-market strategies, while scale-ups face challenges in international expansion and talent acquisition. This limits the sector's ability to grow globally.

4 There is a funding crisis & ineffective public support.

Since 2024, venture capital has collapsed: Series B/C rounds disappeared entirely, and average deal size in the Netherlands plunged to $1M (versus $3M in the EU). While numerous public funding initiatives exist, they appear insufficiently effective, as the pipeline from startup to scale-up remains weak. This fragile funding landscape increases dependency on foreign big tech players.

5 Strategic breakthrough momentum, opportunities and urgency.

70% of Dutch EdTech companies now integrate AI, and 85% are planning international expansion (with Germany as the top target market). EdTech is crucial to solving societal transitions. From education gaps to energy and workforce transformation. But only with targeted support (public, private, and European) can the Netherlands safeguard digital sovereignty and position itself as a global EdTech leader.

Table of Contents.

Introduction
5

The State of Dutch EdTech
15

Societal Challenges
32

Founders Vision
49

Closing
53

Introduction.

About the Dutch Edtech Foundation



Meet the Dutch Edtech team.



JITSKE van OS

Managing Director
Dutch Edtech



BUKET AKSOY

Community Manager
Dutch Edtech



EWOUD de KOK

Board Member Dutch Edtech
Co-Founder FeedbackFruits



ROEL BELLINGA

Board Member Dutch Edtech
Co-Founder itorium
Board Member Universiteit van Nederland



LINDA FRIETMAN

Board Member Dutch Edtech
Founder iamprogrez



JEROEN FRANSEN

Advisory board
CEO & Founder Revisely



ANNET KLOPROGGE

Advisory board
Business Developer
ROM Utrecht Region



KEES MASTENBROEK

Advisory board
Partner What Worked Education Founder
Topicus Education

What we do at the Dutch Edtech Foundation.

1 | We collaborate

We join forces and enable synergy to mutually work on solutions needed within the emerging field of education and learning.

2 | We inform

We work on researches and share insights. This includes a platform to share knowledge, best pracitices and information.

3| We connect

We bring the fragmented education ecosystem together, involve the community and act as a liaison body (also linking public-private).

4 | We lobby

We lobby to improve access to funding for innovations within learning and education.

5 | We create

We create newsletters, blogpost and organize events accustomed to the needs of our members.

6 | We facilitate

We organize (international) trade missions and research consortia.



Dutch Edtech



Our Mission

Empower EdTech entrepreneurs to make a significant impact in education & learning.



Our Vision statement

By 2030, the Netherlands will stand as the global leader in impactful EdTech innovation.

Our goal and ambitions.

As Dutch Edtech, we believe that **the launchpad for innovation is built upon a well-connected and nurturing ecosystem**, where various players—startups, scaleups, educators, investors, and policymakers—all have their own vital roles to play.

We are committed to accelerating the growth of Dutch EdTech companies by providing **strategic guidance**, **fostering connections** within the industry, and **offering access to essential resources**. By removing the barriers that hinder growth, we aim to nurture these companies from their early stages to becoming **global leaders in educational technology**.

To achieve this, we focus on two key pillars:

I. Accelerating the growth and impact of EdTech startups and scaleups

II. Enabling the Dutch EdTech ecosystem to flourish

Accelerating the growth and impact of EdTech startups and scaleups

We empower Dutch Edtech startups and scaleups to become global leaders in educational technology. We are committed to ensuring that these companies are well-equipped to scale, enabling them to lead the transformation of education and sustain a lasting impact for future generations.

Enabling the Dutch EdTech ecosystem to flourish

We aim to cultivate a thriving Dutch Edtech ecosystem of startups, investors, global networks, big tech, research, educational institutions, and government agencies. This collaborative environment will nurture innovation and drive transformative educational solutions on a national and global scale.

Our four tactics to continue growth and strengthen the Dutch EdTech ecosystem in the near future.

1 Strengthening the collaboration between startups, governments, educational institutions, and EU partners, which is essential for further scaling and impact.

2 Realizing a future-proof and competitive Dutch EdTech sector by developing a joint EdTech innovation agenda with key stakeholders.

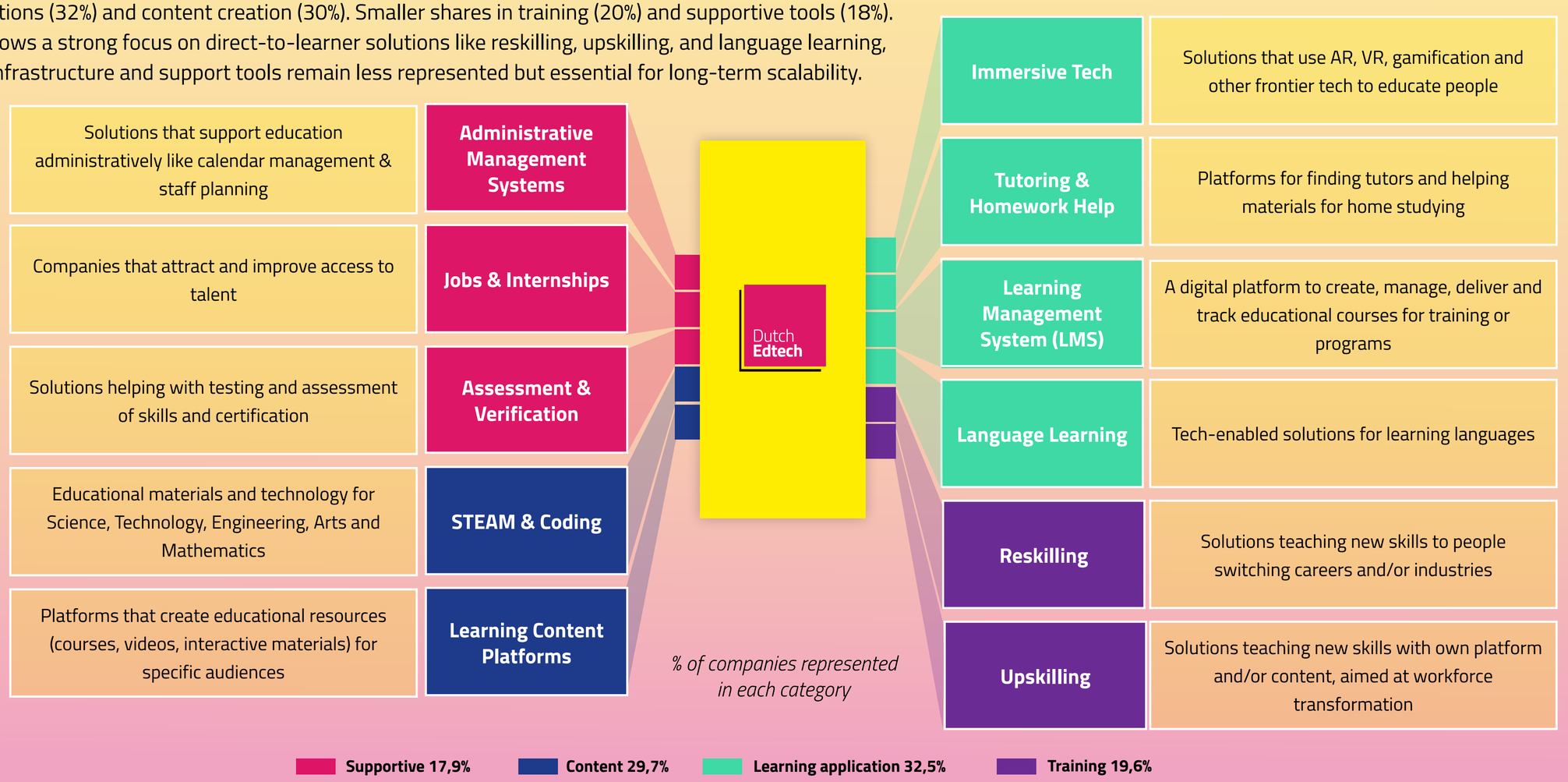
3 Actively supporting growth of the Dutch EdTech companies by connecting and facilitating peer knowledge transfer.

4 Hosting events and gatherings to communicate the needs, ambitions and goals of the Dutch EdTech sector.



The Dutch EdTech sector divided into 11 segments.

The Dutch EdTech Ecosystem is composed of 507 companies across 11 segments. Most are active in learning applications (32%) and content creation (30%). Smaller shares in training (20%) and supportive tools (18%). This shows a strong focus on direct-to-learner solutions like reskilling, upskilling, and language learning, while infrastructure and support tools remain less represented but essential for long-term scalability.



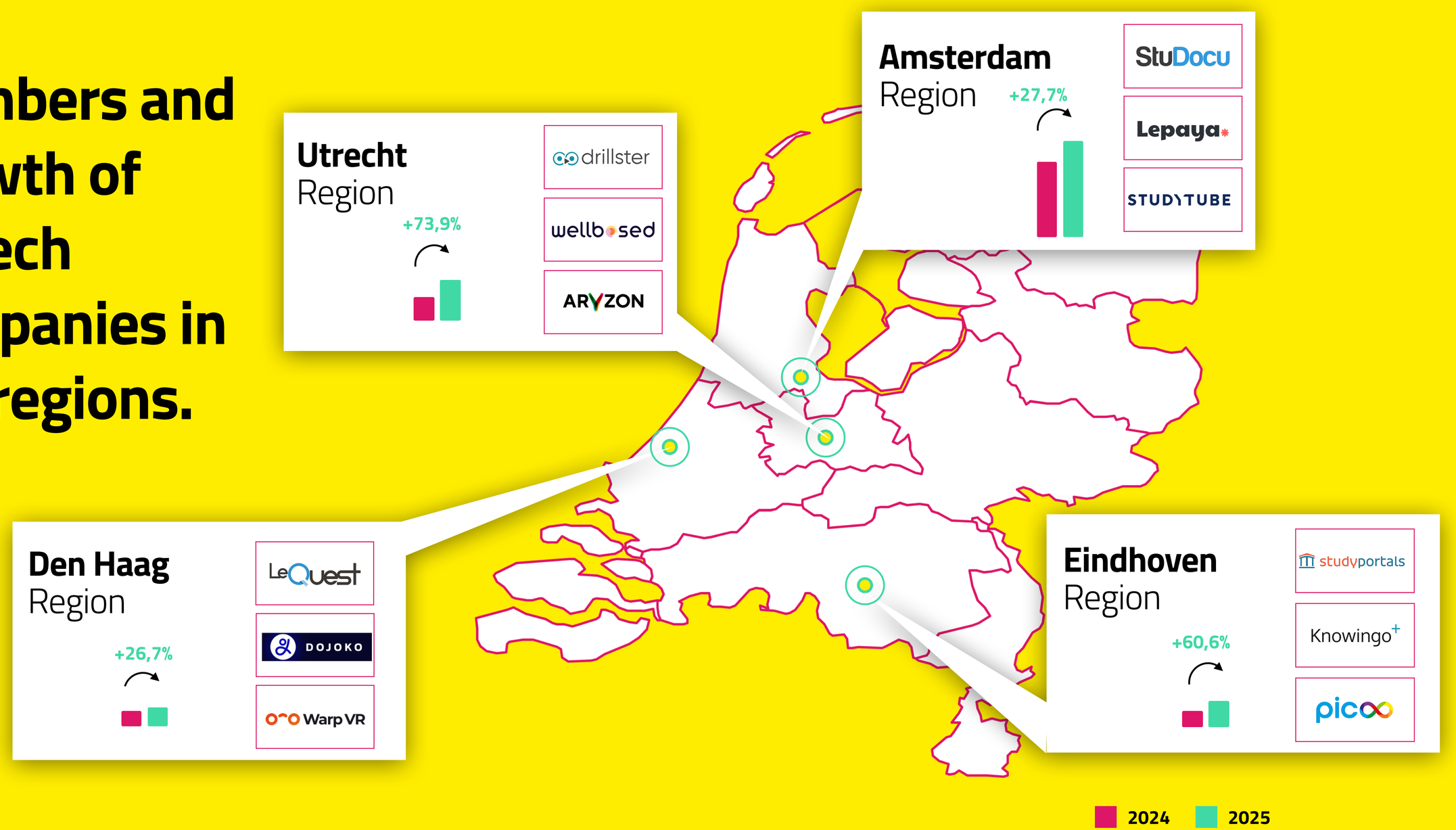
Source: *Dutch Edtech Foundation-Database*

Dutch Edtech members per segment



Source: *Dutch Edtech Foundation-Database*

Numbers and growth of EdTech companies in top regions.



Source: ROM Utrecht Region-Database, Dutch Edtech Foundation-Database — Logos shown are examples of active EdTech companies in each region.

International presence of Dutch Edtech companies.

41% of Dutch Edtech companies are internationally active.

Most Dutch EdTech expansion occurs in neighboring countries or English-speaking markets — with Belgium (26%), Germany (13.7%), the United States and the United Kingdom (each 11%), France (5.5%), and Canada (4.1%) as the main destinations.

Other dots on countries shown on the map represent smaller markets, where only 1–4% of Dutch EdTech companies are active.



Note: Active in a country = having a physical office presence or employing at least 3 full-time local staff or generating 20% or more of the company's total revenue from that specific country.

Source: *Dutch Edtech Foundation-Members' Survey '25*

The State of the Dutch EdTech Ecosystem.

- How the Dutch EdTech ecosystem has evolved
- What drives growth and where we're falling behind
- Key facts, figures, and regional trends
- Challenges that limit scaling and impact
- Opportunities shaping the next phase of growth



Celebrating Dutch EdTech market leaders.

Valuations keep rising, but market leaders remain unchanged. Top 5 Dutch EdTech companies hold their positions despite growth across the board.

	Company name	Market focus area	Market segmentation	Founded	Valuation 2024 (USD x1million)	Valuation 2025 (USD x1million)	Last Round	Last Funding (USD x1million)	Last funding Date	Investors	Investor location
1	StuDocu	Higher Education	Tutoring & homework help	2010	227	300	SERIES B	45,45	may/2021	Partech	US; New York City
2	Lepaya	Lifelong Learning	Upskilling	2018	173	228	SERIES C	34,55	sep/2023	Target Global, Endeit, Educapital, Liquidity Capital, Mars Growth Capital, Mediahuis Ventures	Germany; Berlin NL; Amsterdam UK; London France; Paris Singapore NL, Amsterdam
3	STUDYTUBE	Lifelong Learning	Learning Management systems (LMS)	2010	136	180	SERIES B	27,27	feb/2022	Energy Impact Partners (EIP)	US; New York City
4	instruqt	Lifelong Learning	Immersive tech	2018	75	99	SERIES A	15	may/2023	Blossom Capital	UK; London
5	archipel	Lifelong Learning	Learning content platform	2019	65	86	EARLY VC	13	jun/2022	Pride Capital Partners	NL; Amsterdam

Source: Dealroom

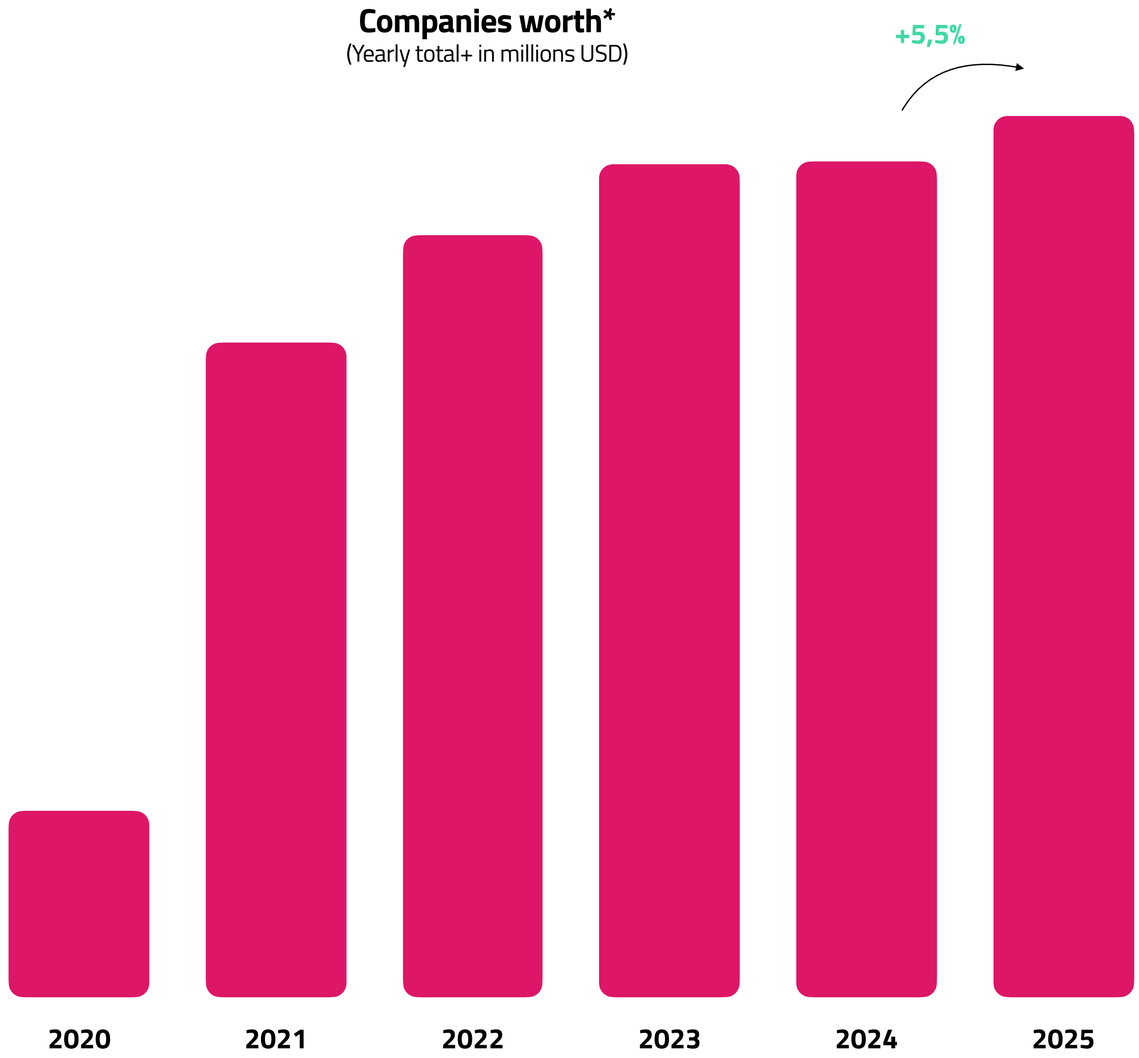
EdTech value x4 since 2020.

From $0.4B in 2020 to nearly $2B in 2025. Stable growth signals sector maturity.

In the last five years, Dutch EdTech has been transformed. Covid acted as a catalyst, pushing the market from a few hundred million to over a billion in less than 18 months. What should have taken a decade happened almost overnight. Digital learning moved to the mainstream.

Since 2022, growth has steadied at around five percent annually. That shift signals maturity: from chasing pandemic spikes to consolidating, professionalizing, and building sustainable models.

With the sector now worth $1.6B in 2022, $1.75B in 2023, and projected $1.85B by 2025, EdTech has evolved beyond the stage of hype to become a vital part of the educational infrastructure.



Source: *Dutch Edtech Foundation-Database, Dealroom*

A growing ecosystem of companies and jobs.

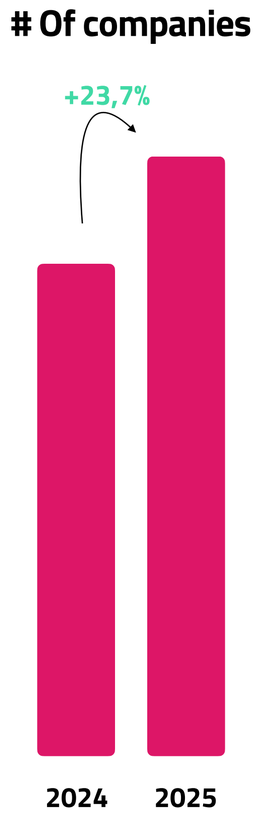
The sector expands wit a +20.7% increase in the number of companies and a year-over-year growth of +18.6% in FTEs. Signaling both scaling and job creation.

Dutch EdTech is no longer just about market value. It's about scale and jobs. In a single year, the sector grew from 410 to 495 companies (+20.7%), reflecting strong momentum and a steadily broadening ecosystem.

The workforce follows the same path: from 11,000 FTEs in 2023 to 13,400 in 2025 (+18.6%). This marks maturity. Companies are hiring, building, and embedding themselves more deeply in the Dutch economy.

EdTech has entered a phase of sustainable expansion, no longer driven by short-term spikes, but evolving into a durable employer, innovation hub, and pillar of the knowledge economy.

Source: *Dutch Edtech Foundation-Database*



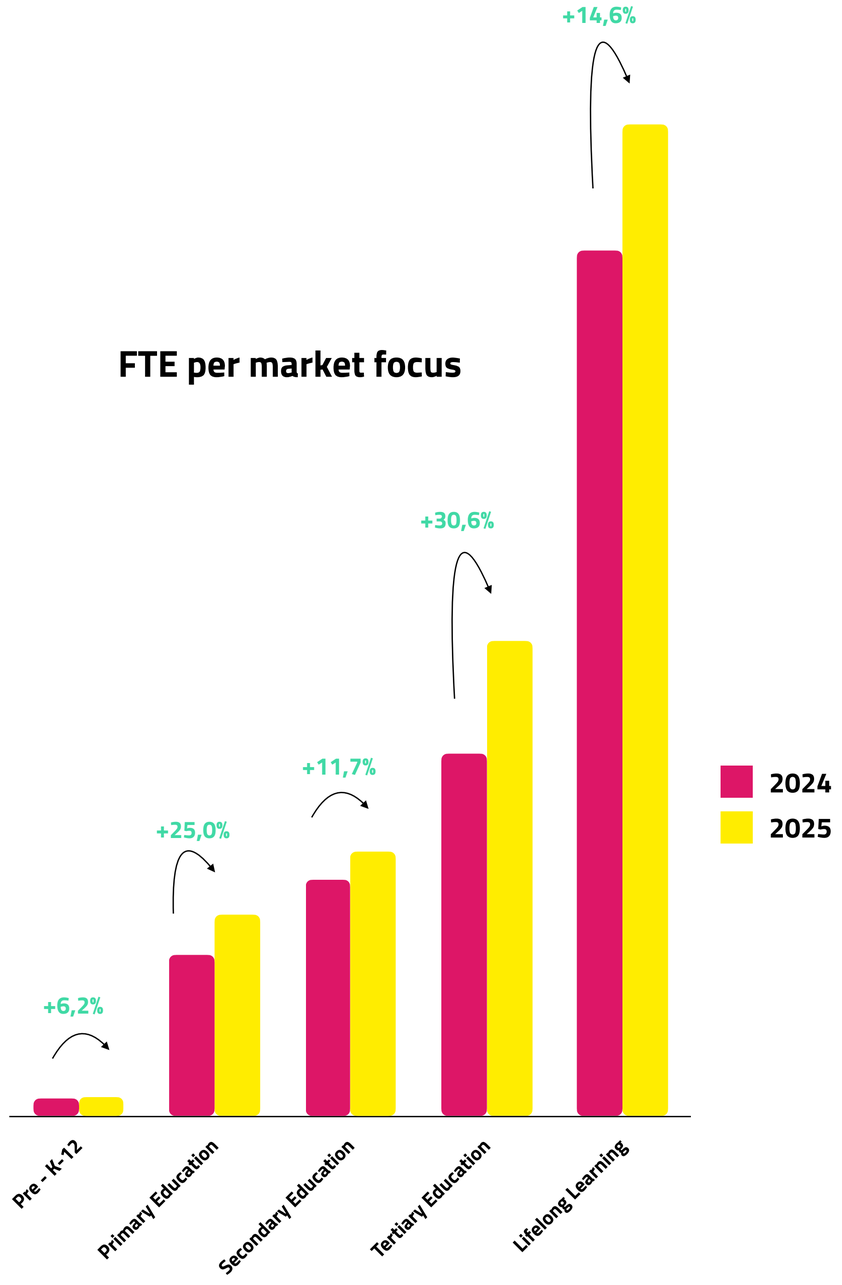


Most FTE in Lifelong Learning. Most growth in Tertiary Education.

Dutch EdTech grows, but most of the weight and opportunity lies in Lifelong Learning and Higher Education.

Growth across the Dutch EdTech landscape is uneven. Lifelong Learning remains the largest employer by far, rising from 5,950 to 6,819 FTE (+14.6%) in just one year, larger than all other segments combined.

Tertiary Education shows the strongest growth rate, increasing by 30.6% (from 2,500 to 3,266 FTE), while Primary and Secondary Education record more modest gains. Pre-K remains a niche segment, employing only 137 FTE.



Source: *Dutch Edtech Foundation-Database*

Lifelong Learning dominates in scale and size.

Half of all Dutch EdTech companies focus on Lifelong Learning, including the majority of the sector's scaleups.

Lifelong Learning leads Dutch EdTech. It holds the largest share of companies (51%) and dominates every size segment. From micro-firms (114 with 1–10 FTE) to the bigger players (20 above 50 FTE), this focus area outpaces all others in both breadth and scale.

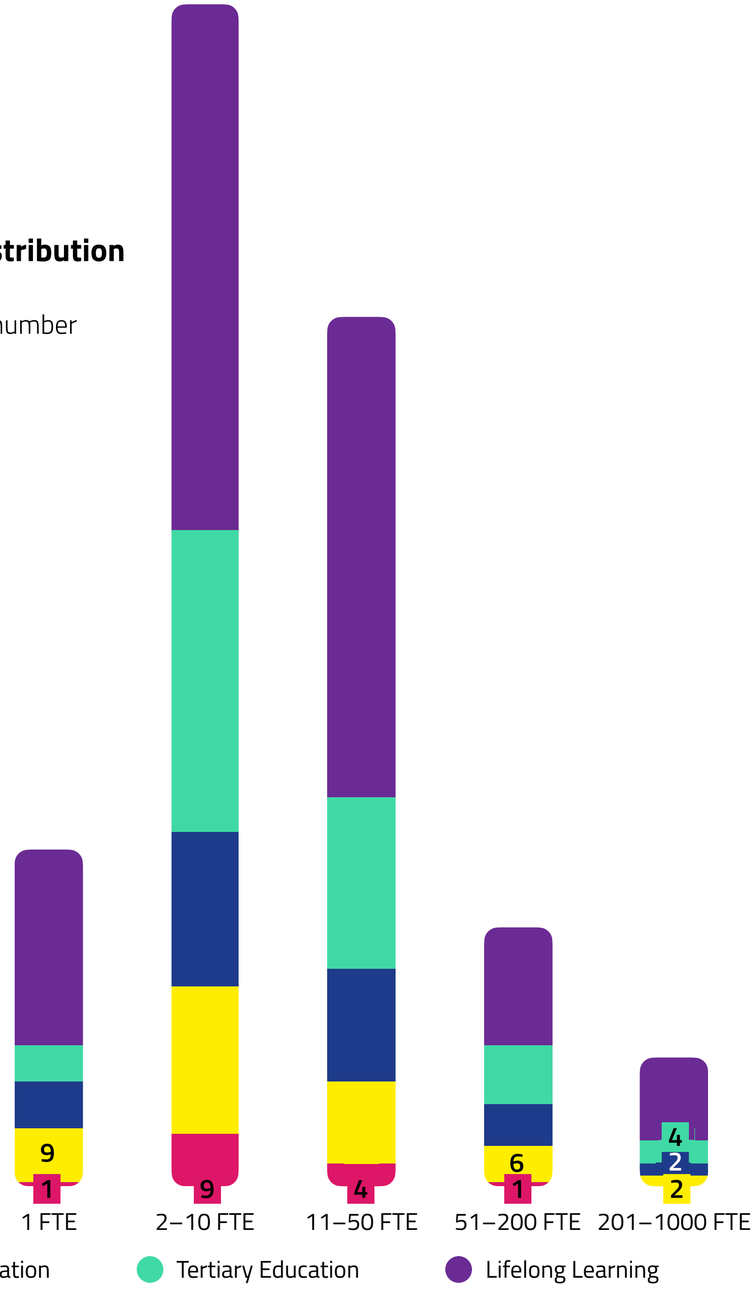
By contrast, Higher Education shows more mid-sized companies (29 with 11–50 FTE), suggesting early signs of consolidation. Primary and Secondary Education remain highly fragmented, dominated by small firms. Pre-K is marginal with just 3% share.

Source: *Dutch Edtech Foundation-Database*

Company size distribution per market focus
In FTE and absolute number of companies)

Share companies per market focus

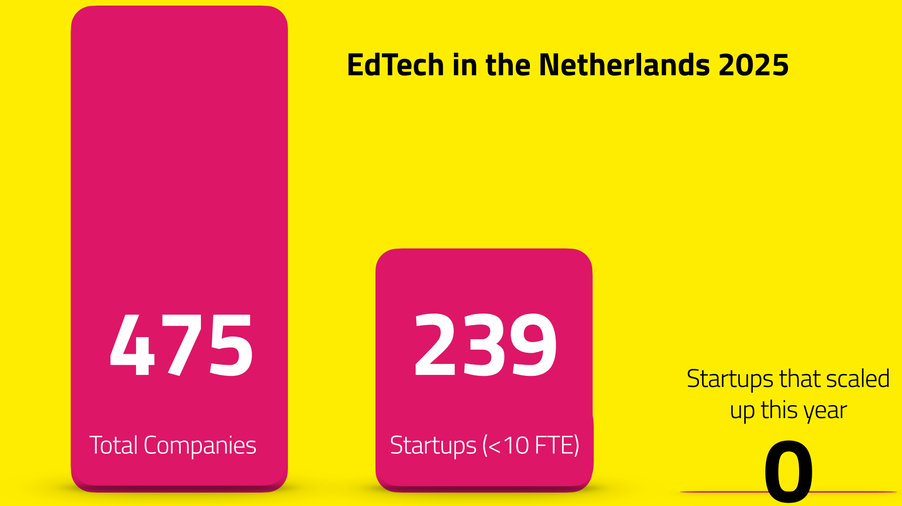




Out of 239 startups, not a single one scaled up.

The Netherlands hosts one of Europe's densest EdTech ecosystems, with 475 active companies. With 239 startups, the country continues to outperform larger nations in startup creation.

Yet, according to the official OECD/EU definition of a scale-up (≥10 employees at the start of the period and ≥20% annual growth in FTE or revenue for three consecutive years*), no new EdTech scaleups have emerged by mid-2025.



8 companies that show notable growth

Company	Website	FTE 2023 > 2024 > 2025	Market focus
BrainBite	www.brainbite.ai	**5 > 16 > 33**	Primary Eduction
LearnWise	www.learnwise.nl	**5 > 11 > 31**	Higher Education
-WALL	www.interactivewall.nl	**9 > 11 > 15**	Primary Education
Chat license	www.chatlicense.com	**6 > 8 > 13**	Pre - K-12
METAVERSE SOLUTIONS	www.metavers-solutions.nl	**9 > 11 > 15**	Secondary Education
Edu-Suite edtech publishing solutions	www.edu-suite.com	**3 > 6 > 10**	Secondary Education
pluvo	www.pluvo.com	**6 > 8 > 13**	Lifelong Learning

Source: Based on Dutch EdTech company database (n=507) with LinkedIn FTE analysis, 2023–2025.
* HolonIQ, Brighteye Ventures ** OECD/EU scale-up definition

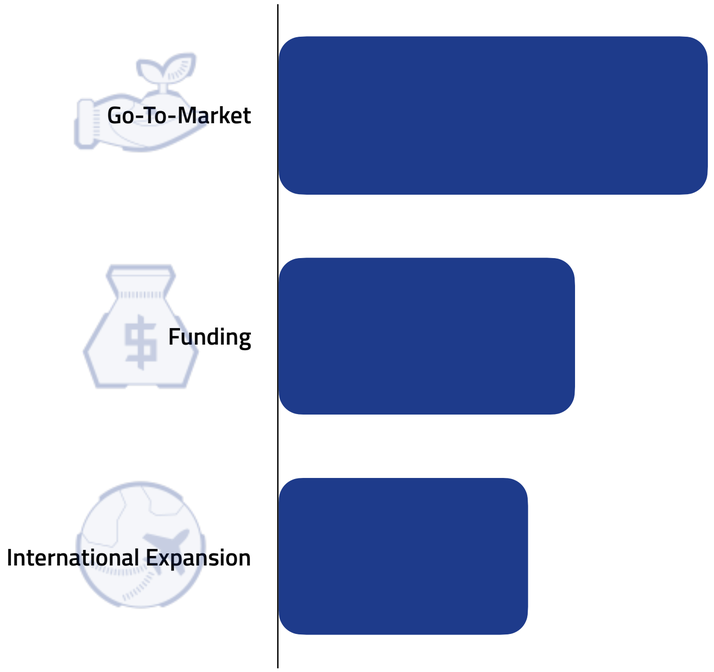
Scaling challenges for Startups.

As young companies grow, their main obstacles are often commercial rather than operational.

This year, more than half of startups identify go-to-market as their top challenge. Funding, while still critical, has become slightly less dominant compared to previous years. International expansion remains less pressing at this stage, but is beginning to surface as companies prepare for cross-border opportunities.

Compared to last year, the share of startups struggling with funding has dropped by 34%, while the weight of go-to-market issues has risen significantly. International expansion is now on the horizon but not yet the defining barrier.

Top 3 scaling challenges for startups



Founders' Voices

"One of the key challenges we face is balancing frictionless learning delivery with meaningful engagement. Designing microlearning experiences that are short yet impactful -within workplace constraints- requires constant iteration and user feedback."
Lifelong Learning | Learning Content Platforms

"Finding the right impact investor. For one investor we are to early, another wants to see more traction, another says we are just not exactly in their scope."
Secondary Education | Immersive Tech

"Arranging meetings with relevant stakeholders for international expansion, and - in those meetings, but also in marketing - communicating high-level scientific research in a way that amazes but does not confuse."
Secondary Education | Assessment & Verification

Source: *Dutch Edtech Foundation-Members' Survey '25*

Scaling challenges for Scaleups.

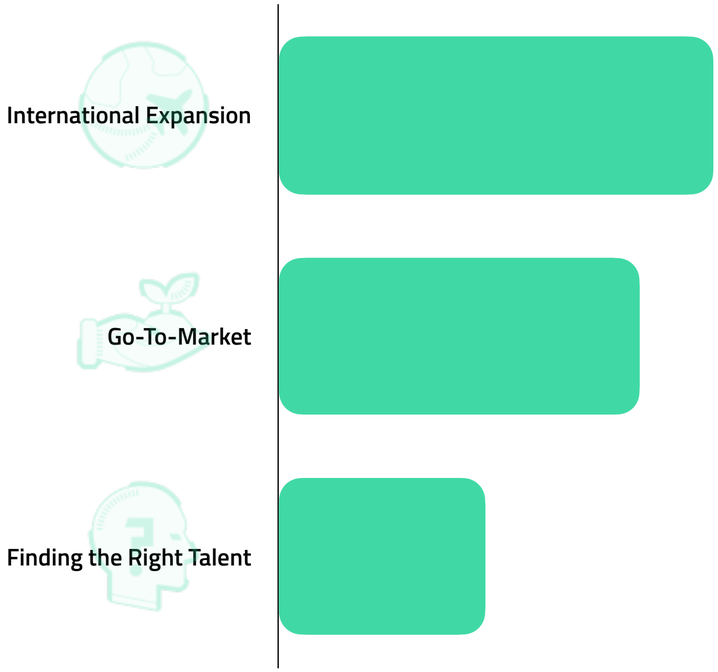
Once companies reach scaleup stage, the balance shifts.

Funding becomes less of a bottleneck, but global growth and organisational complexity step forward as major hurdles. International expansion is now the leading challenge, cited by nearly two-thirds of scaleups, while talent and market reinvention rise in importance as businesses mature.

Compared to last year, the share of scaleups struggling with go-to-market issues has decreased by 46%, while international expansion has surged by 33%. Finding the right talent also emerges as a structural challenge for sustaining long-term growth.

Source: *Dutch Edtech Foundation-Members' Survey '25*

Top 3 scaling challenges for scaleups



Scaleup founders' voice about the challenges

"In our internalization efforts we assumed that the go-to-market in our home market would work in new markets, that has proven to be wrong. We needed to completely rethink and reinvent this approach which took us a long time, required many failed attempts and only for the last 12 to 18 months we have found a complete new go-to-market that is scalable and works." **Higher Education |** Assessment & Verification

"It is challenging to find the right business model for a technical application that is not commonly known yet." **Lifelong Learning |** Immersive Tech

"It remains a challenge to find and be found by young talent."
Secondary Education | Learning Content Platforms

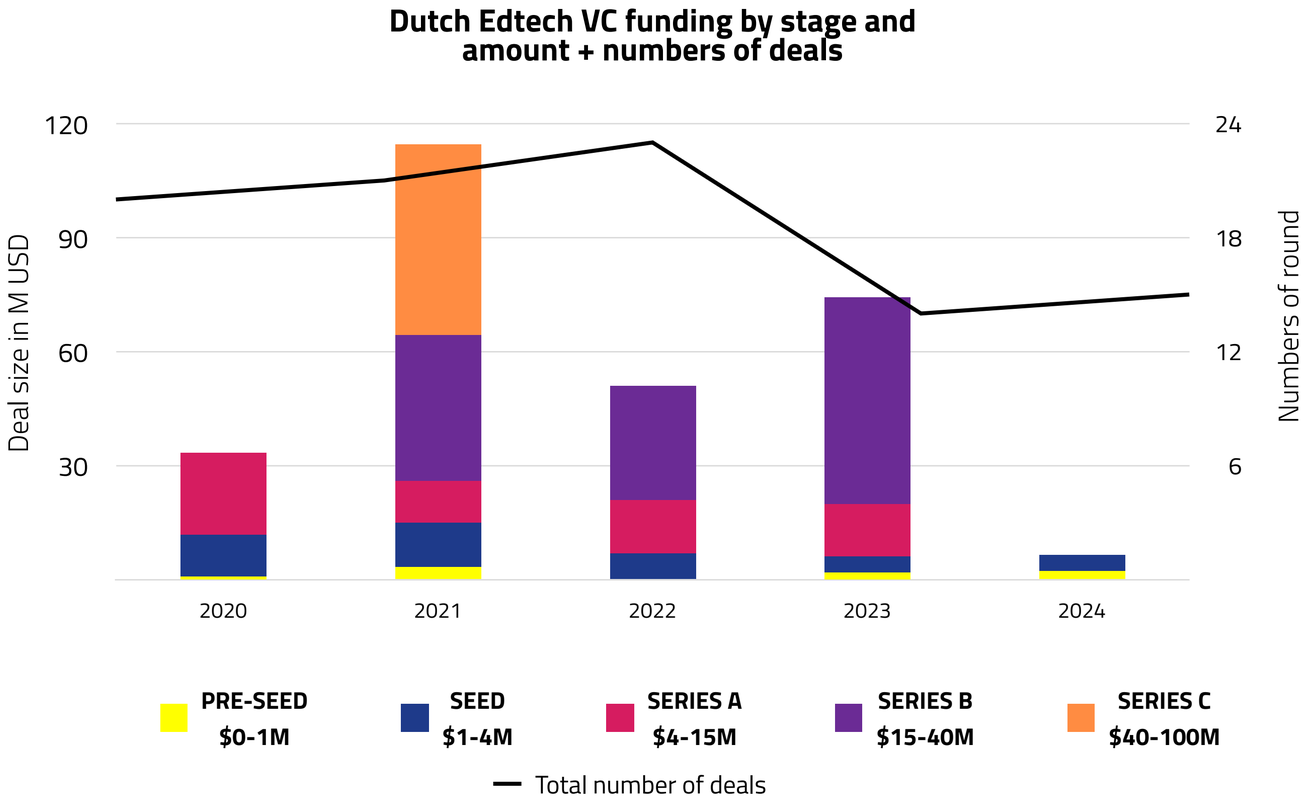
2024: Fewer deals, smaller rounds.

All investment activity has shifted to pre-seed/ seed, while Series B/C funding disappeared in 2024.

The year 2024 marks a turning point for Dutch EdTech funding. After years of momentum, the flow of venture capital has slowed to a trickle. The big growth rounds that once fueled Series B and C companies have vanished, leaving only pre-seed and early-stage deals on the table.

Investors have shifted their focus back to the earliest stages, placing smaller bets and taking fewer risks. The total number of deals has now stabilized at a much lower level than during the boom years of 2021–2023, showing a market that is more cautious, selective, and reluctant to back scaleups.

Source: Dealroom



NL diverges from EU & global trends.

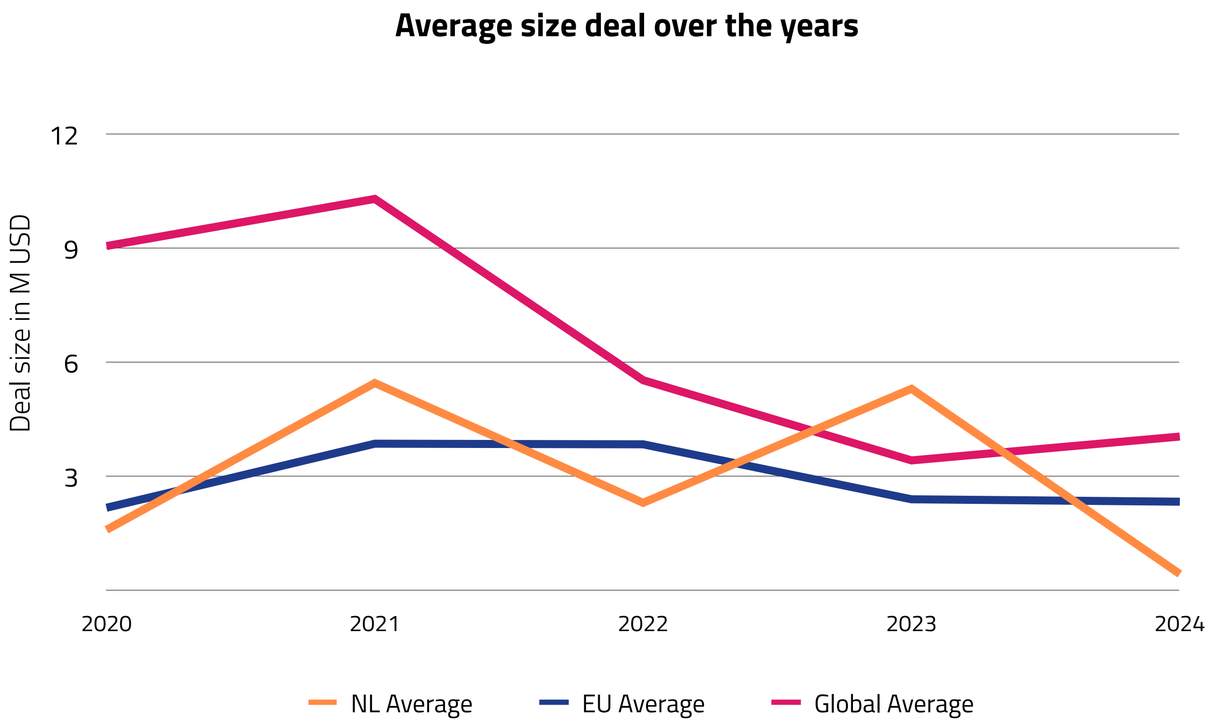
The Dutch funding landscape collapsed even more severely than the trends in the EU and globally.

The data shows a stark divergence between the Dutch EdTech market and international trends. While deal sizes in Europe and globally declined but then stabilized, the Netherlands saw a far steeper collapse.

In 2021, Dutch deals peaked at around $6 million, but by 2024 they had plunged to just $1 million, compared to Europe's steady $3 million and a modest global recovery.

The message is clear: Dutch EdTech was hit disproportionately hard, with investors retreating faster than elsewhere and leaving a tougher, more fragile landscape for startups.

Source: Dealroom



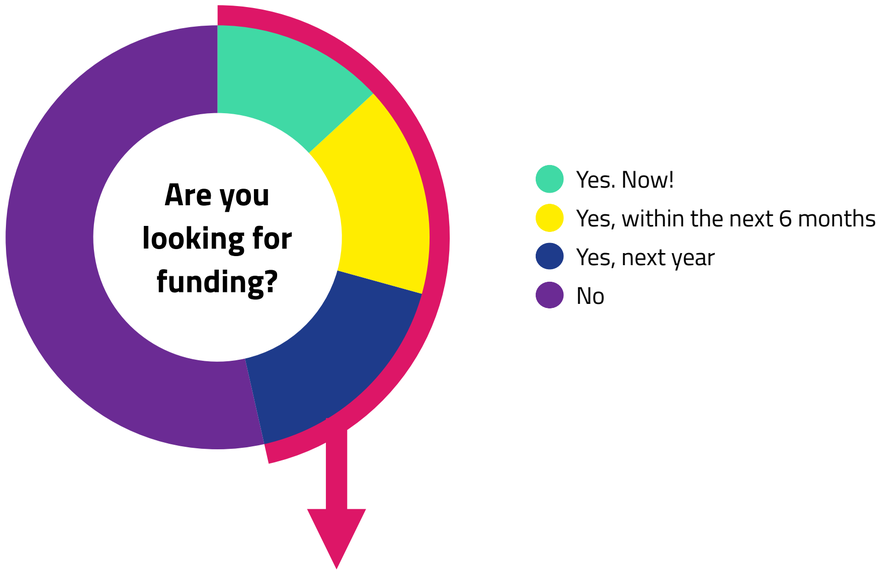
47% of the EdTech companies seek funding.

Grants and venture capital stand out as the most in-demand funding sources, but preferences vary by market segment.

Early education (Pre-K12 and Primary) relies heavily on grants and venture capital, showing limited market maturity and dependence on external support. Secondary Education displays a more diverse funding appetite, spanning angels, crowdfunding, and corporate investors.

Higher Education stands out with a strong demand for venture capital and corporate investment, signaling a more developed segment. Lifelong Learning confirms its role as the anchor of Dutch EdTech with the broadest and most balanced mix of funding types; from accelerators and angels to VC and grants, underlining both its maturity and its ambition to scale.

Source: *Dutch Edtech Foundation-Members' Survey '25*



% of funding type needs among funding seekers

Funding type →

Market Focus Area ↓	Accelerators & Incubators	Corporate Investment	Crowdfunding	Angel Investors	Grands	Venture Capital
Pre-K12	0%	14%	14%	29%	29%	14%
Primary Education	18%	9%	0%	27%	36%	27%
Secundary Education	36%	20%	20%	40%	36%	32%
Higher Education	6%	13%	0%	25%	19%	19%
LifeLong Learning	19%	19%	13%	38%	38%	31%

Planned markets for Dutch Edtech's international growth.

A look at country expansion preferences per market segment, showing where Dutch Edtech companies are aiming to scale internationally in the next 12-24 months—and where some remain focused only on the Netherlands.

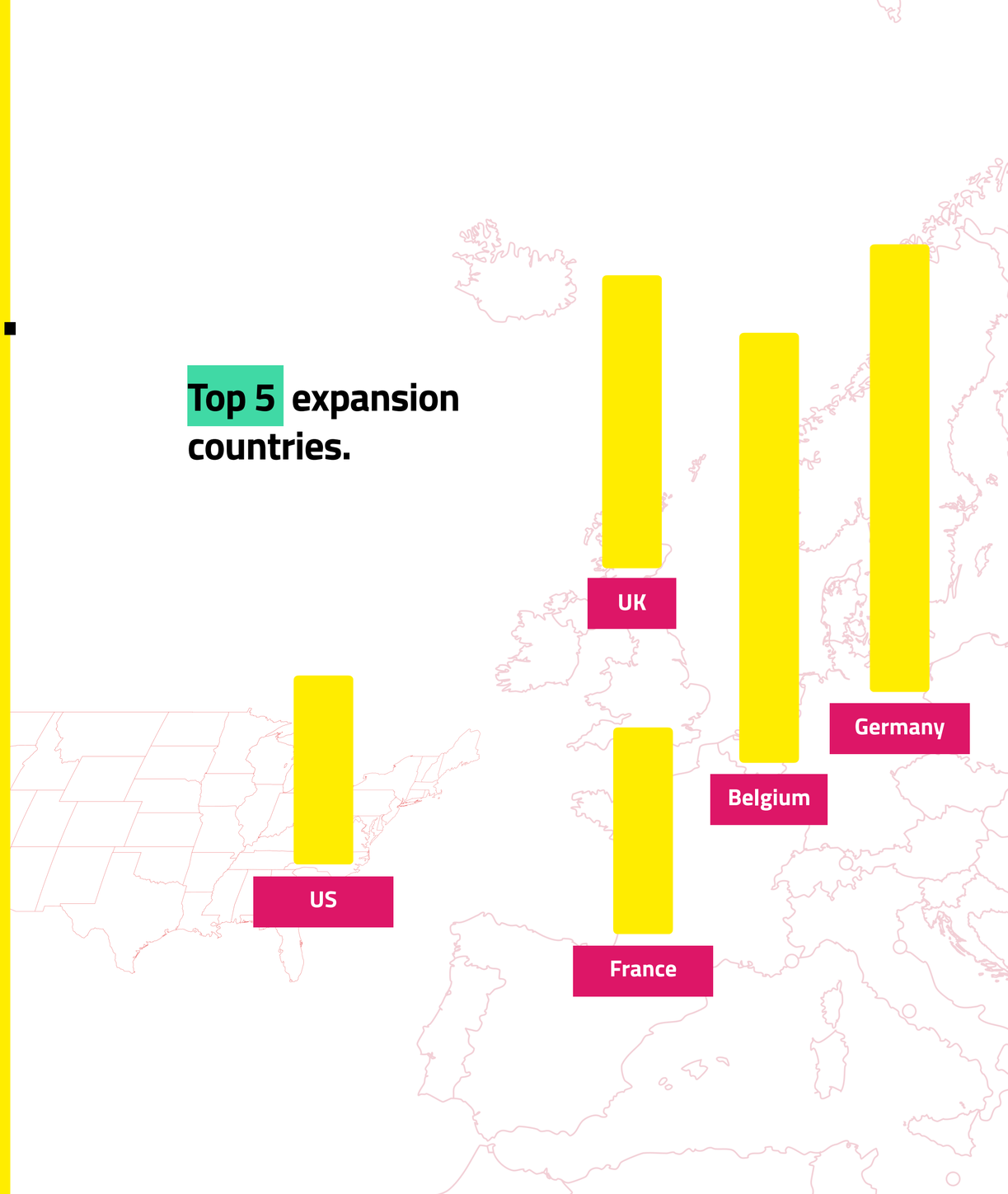
The question we've asked our community was:

Which countries are you planning to expand to in the next 12–24 months?

The outcome?

- %85 of Dutch EdTech companies are looking to expand, meanwhile the remaining 15% are focusing only in the Netherlands.
- Between 7-12% of the companies are looking into expanding to one or several of these countries: Spain, Sweden, Australia, Denmark, Italy, Norway.
- Half of Lifelong Learning (8 out of 16 companies) is targeting Germany.
- Neighbouring countries are clearly targeted as a first stop of expansion.

Source: *Dutch Edtech Foundation-Members' Survey '25*

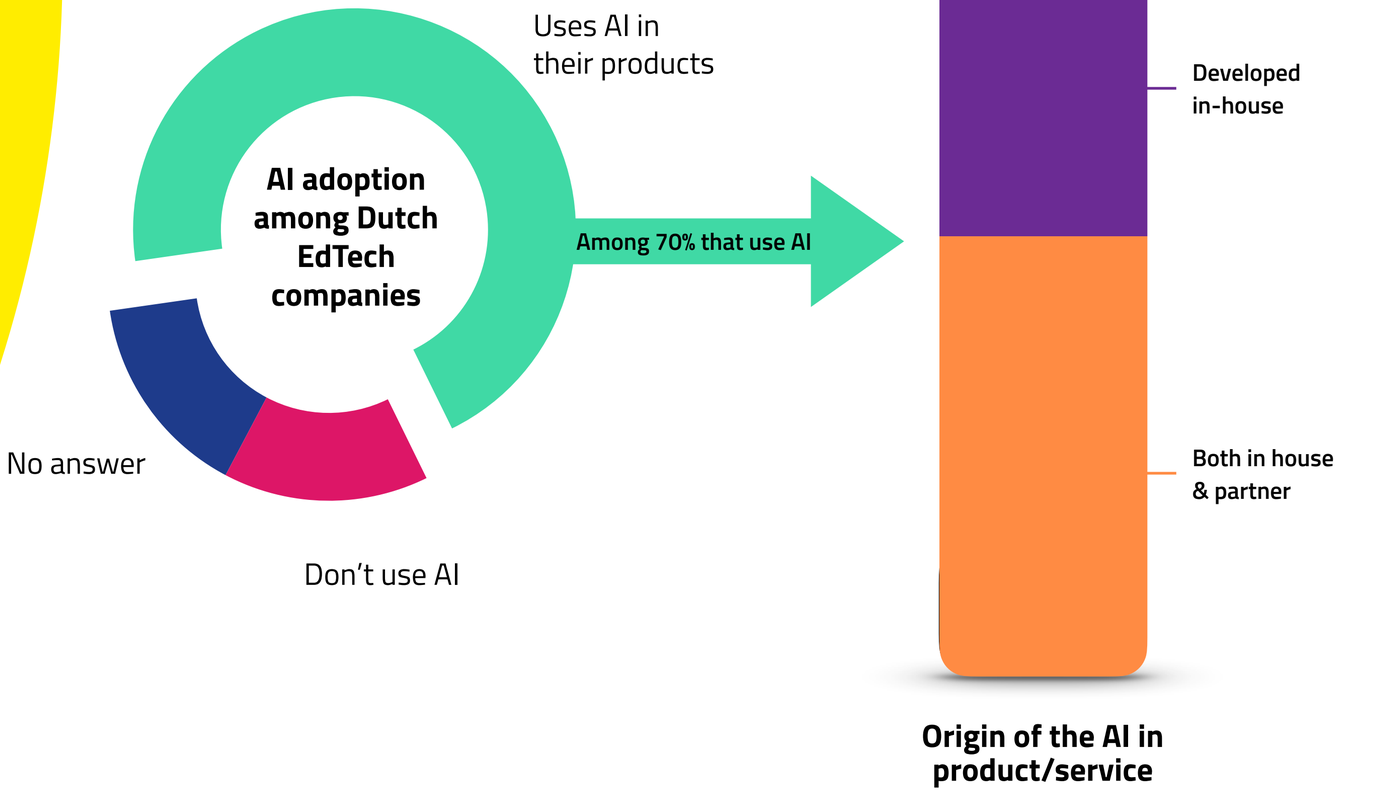


AI is mainstream, but where it comes from matters.

7 out of 10 Dutch EdTech companies now use AI. Adoption is split: some build it themselves, others rely on external partners, often Big Tech.

AI is embedded across the majority of Dutch EdTech firms, with applications ranging from content generation and tutoring to analytics, assessment, and immersive learning. Innovation is alive and mainstreaming: half of AI features are built in-house, half via integrations.

AI and Immersive Learning are no longer “future trends” they are becoming baseline expectations. Differentiation now depends on quality, evidence, and outcomes.



Source: *Dutch Edtech Foundation-Members’ Survey ’25*

How Dutch EdTech companies use AI.

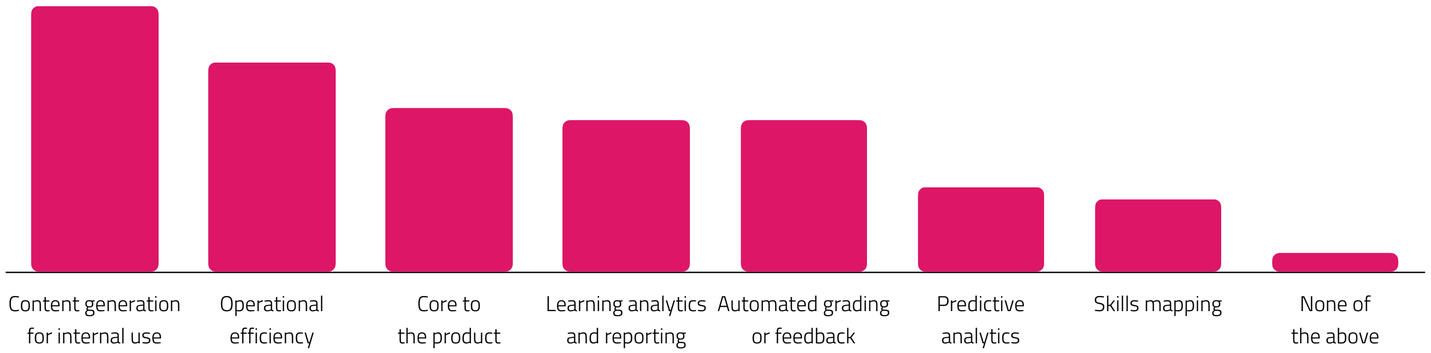
AI is applied both in user-facing features and behind the scenes for internal processes. Companies often combine multiple applications.

Dutch EdTech companies use AI both behind the scenes and in user-facing tools. Internally, it's mainly about content generation (65%) and operational efficiency (51%), but also touches product design, analytics, and grading.

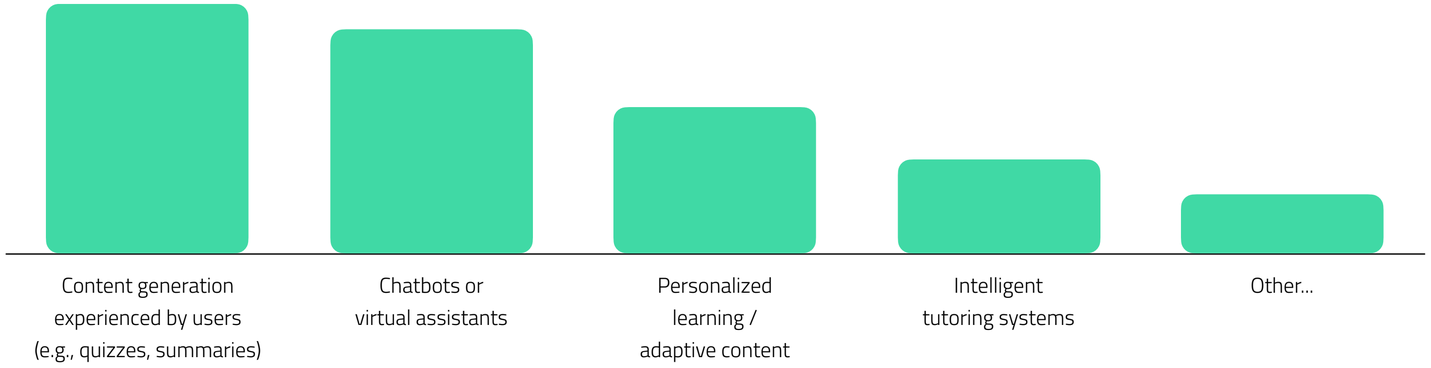
Externally, AI powers content experiences (58%), chatbots (52%), and personalized learning (34%). Together, this shows AI is not just an add-on but embedded in the core of how Edtech companies build and deliver their products.

Source: *Dutch Edtech Foundation-Members' Survey '25*

How AI using companies use AI behind the scenes*
(in % of AI using companies)



How AI using companies use AI in their product or service**
(in % of AI using companies)



*** The AI is used to improve internal proceses**
****The AI is directly used by learners/users/clients by using the products and/or services of the companies**

(Public) EdTech initiatives for support sector are fragmented.

	Initiative	About	Initiator	Partners	Opportunity	Market	Regional Scope
Quality Education	**3E Framework**	Framework for evidence-informed educational innovation.	Npuls	Den Haag Hooge School	Improve quality standards across education. Focus on the framework when developing technology for education.	Primary, Seconday,	Europe
	Masterclass: Evidence Based Learning Engineering	Connecting founders with learning science experts translating research into product strategies.	Dutch Edtech	Thomas Moore	Scale-up professional learning for founders, CEO's, product leaders to gain hands-on insights to strengthen their product's educational effectiveness.	All	National
Financial Support	**Edtech Vouchers**	Financial incentive for EdTech pilot- and advice requests.	ROM Utrecht	Kansen voor West III 2021-2027, Gemeente Utrecht, Provincie Utrecht, ROM Utrecht Region	Second round opens on November 10th for Edtech entrepreneurs based in the Province of Utrecht.	All	Regional
	DUTCH Calls Round 3	Financial incentive for (M)EdTech innovation	DUTCH	ROM Utrecht Region	Starts in november 2025 with an Open Call, in combination with a Product Call that focuses on seven in-depth themes	Higher	Europe
	Digital Ventures	Financial investement for early phase Edtech entrepreneurs	ROM Utrecht Region		Early-stage financing: venture capital for the proof-of-concept phase. Startup Innovation Fund: investments between €50,000 and €500, focused on the initial phase of entrepreneurship. Participation Fund: for companies in the growth phase, from €250,000 to €5 million.	All	Regional
Public values in Education	**European Collaborative Trustframework**	The Trustframework is a set of key values followed by practical guidelines for Edtech Founders, Edtech Buyers, and Contract Management.	Npuls	Feedbackfruits, Dutch Edtech	Read the 14 Edtech Design Guidelines to build a long-lasting, trustworthy business with a perpetual positive effect on public education.	Vocational Higher Ed	Europe
International -ization	**Edtech Outlook**	Join us and internationally oriented Edtech entrepreneurs and you will be offered a peak into our joint international Edtech agenda of 2026	ROM Utrecht Region	Dutch Edtech & IPON	Invites will be sent out late 2025.	All	National
Collaboration	**Edtech Workspace**	One central space for all companies and organizations in EdTech dedicated to co-work & co-create together.	Edtech Workspace	Jaarbeurs Utrecht, Npuls, Dutch Edtech, ROM Utrecht	Join us during Community Day or get in touch with Wouter if you're interested in grabbing a seat	All	National
	Edtech Incubator	Supporting ambitious founders in edtech and learntech to turn innovative ideas into scalable businesses that make a real-world impact.	UtrechtInc	Dutch Edtech, ROM Utrecht Region	Starting in Feb 2026, opening for admission late 2025	All	National
	Edtech Ecosystem overview	Mapping of all EdTech opportunities in every region in the Netherlands.	NOLAI	Brightlands, Mercator Lounge, Dutch Edtech, ROM Utrecht Region, OostNL, Radboud Universiteit	Make sure to stay updated through NOLAI's Linkedin.	Primary, Seconday	National
	Edtech Maturity scan & Growth plan	Development of measurements regarding maturity and growth trajectories.	NOLAI	Brightlands, Mercator Lounge, Dutch Edtech, ROM Utrecht Region, OostNL, Radboud Universiteit	Make sure to stay updated through NOLAI's Linkedin.	Primary, Seconday	National
	Co-creation programme	Development of AI prototypes in co-creation with schools, researchers and companies	NOLAI		Make sure to stay updated through NOLAI's Linkedin.	Primary, Seconday	National
	Edtech Marketplace	Platform matching demand and supply of EdTech through a Dynamic Purchase System (DAS).	Npuls		Register through Mercell, upload documents, show your experience and react on responses.	Vocational and Higher Ed	National

Beyond the Numbers: The State of Dutch EdTech Today.

📊 **Market Overview |** The Dutch EdTech sector reached a value of approximately $2 billion in 2025, growing steadily at 5% per year and employing over 13,000 professionals.

🧭 **Market Segments |** The majority of companies operate in Lifelong Learning (51%), while Tertiary Education shows the strongest growth rate at 30%.

🏢 **Company Size & Scale-ups |** Although the number of startups is high, no firms have yet scaled to OECD standards, indicating a fragmented and early-stage ecosystem.

💸 **Funding Landscape |** Investment activity has declined, with average deal sizes falling from $6 million to $1 million and half of all companies currently seeking funding.

🌱 **Challenges – Startups |** Startups face barriers in market entry, funding acquisition, and early international expansion.

🚀 **Challenges – Scaleups |** Scaleups experience challenges in attracting skilled talent, expanding internationally, and adapting their business models for new markets.

🌍 **Internationalization |** Around 85% of Dutch EdTech companies plan to expand abroad, primarily targeting Germany, Belgium, the United Kingdom, France, and the United States.

🤖 **AI Adoption |** Approximately 70% of companies use AI, mainly for content creation, tutoring applications, and learning analytics, showing broad integration across the sector.

🧩 **Ecosystem Initiatives |** Initiatives such as the EdTech Incubator, Evidence-Based Learning Masterclass, and European Trust Framework are designed to enhance collaboration and strengthen the Dutch EdTech ecosystem.

The Netherlands has plenty of startups and scaleups. Now it's time to truly innovate and build impact at scale.
Despite numerous initiatives, the Dutch EdTech sector still lacks coherence, alignment with entrepreneurs' needs, and effective scaling.
Big Tech dominance and fragmented efforts continue to limit space for genuine innovation. A cultural shift is needed, one that embraces ambition, commercial thinking, and smarter allocation of resources. Growth is not just about numbers; it's about creating the right conditions for companies to scale sustainably and make measurable impact.
The opportunity is there: to build not just more EdTech companies, but a stronger, more connected system that defines the future of learning, in the Netherlands and beyond.

Societal Challenges

- EdTech as driver for societal transformation
- Foundational education in crisis
- Energy transition skills
- Workforce shortage of healthcare
- Accessibility of education
- Teachers under pressure



EdTech as driver for societal transformation.

The world is changing faster than ever. Climate change, ageing populations, migration, inequality, and artificial intelligence are reshaping every aspect of our lives. Each of these transitions demands new skills, new ways of learning, and new ways of thinking and EdTech plays a crucial role in enabling that transformation.

Future-ready skills
EdTech accelerates adoption of digital literacy, creative problem-solving, and interdisciplinary collaboration.

Agile education
Online and blended formats make pedagogical innovation easier, allowing education to adapt at the speed of society.

Collaborative learning
Digital tools connect learners, educators, and experts worldwide, democratising access to knowledge.

The impact
A culture of continuous innovation in both learning and teaching, transforming education from a system that merely keeps up with change into a driving force for societal resilience.



Dutch Edtech

Foundational Education in crisis.

Dutch pupils are falling sharply behind in maths, reading, and science, while teacher shortages make personalised learning impossible. Proven innovations exist, but systemic resistance and entrenched interests block them from reaching classrooms.

EdTech as a solution

- **Faster tailored support** – Adaptive systems make personalised learning scalable, ensuring every pupil gets the right challenge at the right time.
- **Reduced teacher workload** – Lesson platforms reduce prep time, automate classroom management, and free teachers to focus on teaching.
- **Stronger foundations** – Digital practice tools in maths and languages give students real-time feedback and teachers actionable insights.
- **Engaged learners** – Gamified and interactive tools motivate pupils to keep practicing, both in and beyond the classroom.

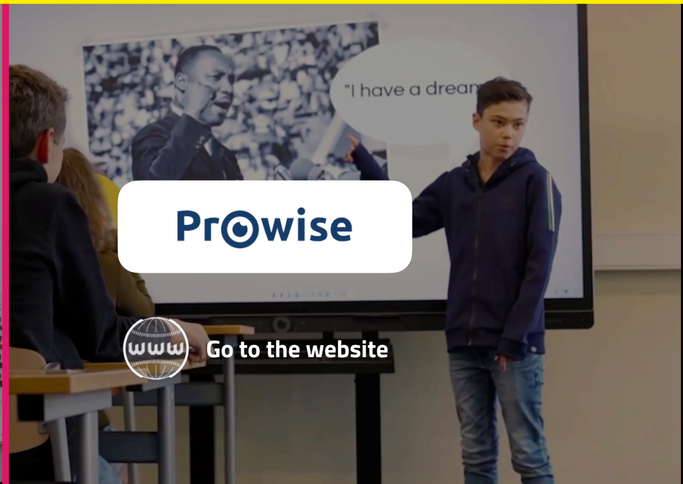












Dutch Edtech

Innovation in Practice.

Gynzy

"Giving Teachers Time To Teach Again." By offering high-quality, ready-made, personalised lessons aligned with curricula, Gynzy reduces prep time so teachers focus on students. Built on research showing teachers impact learning most, Gynzy serves 100,000 teachers in NL & Flanders. In 2024, the survey showed 65.7% saved time with instant, tailored materials.

sQula

Squla lets primary pupils practice all subjects in a fun, engaging way, keeping fundamentals sharp through short, personalised home practice. A study with 932 pupils showed mental arithmetic typically dropped –0.26 SD over summer; Squla practice reduced this loss by ~40%. By sustaining practice, Squla measurably mitigates summer learning loss so teachers spend less time re-teaching.

Go to case study

snappet

Snappet drives proven learning gains in primary education: at least one extra year of progress per student while reducing teacher workload. With adaptive, evidence-based core curricula, Snappet ensures all students learn at the right pace, helping close achievement gaps and supporting teachers. Backed by research on digital learning's positive impact in math achievement.

Go to case study

StudyGo

StudyGo supports secondary students with homework and test prep based on their school books. Its AI Tutor offers on-demand Socratic guidance, boosting understanding and engagement when teacher time is limited or outside school hours. An A/B test (~1K users) showed higher gains in understanding (69% vs 51%) and deeper exploration (79% vs 62%), with exercises partly substituted (~10%).

Go to case study

topicus

Topicus develops data-driven platforms and student monitoring systems that support personalised learning across Dutch education. By connecting data and insights, Topicus empowers schools, teachers, and policymakers to improve learning outcomes and tailor education to each student's needs.

Prowise

Prowise tackles the challenge of ensuring equal opportunities in reading, math, and digital/AI skills despite teacher shortages. Utilising sustainably developed Dutch hardware and software, Prowise makes learning easier and more fun, empowering teachers with tools for adaptive practice, instruction, classroom & IT management, and smart AI use.

Entrepreneurs Perspective: Foundational Education in Crisis.



At Squla and StudyGo, our mission is to empower every child to grow. In a time of widening achievement gaps and teacher shortages, we see how vital it is to provide every learner with personalised support. As a Dutch Edtech leader we combine the best of Tech and AI with proven educational expertise. We create platforms that make learning both effective and enjoyable. We don't aim to replace schools or teachers, but to complement classroom learning and helping children practise at home and build strong foundational skills. Our vision is to shape the future of personalised learning for the next generations and make sure every child has the confidence and tools to succeed.

– **Jeroen Munk** | CEO



"Teaching can always be awesome, but it is also demanding. A core challenge is that even well-designed curricula are never created with your specific classroom in mind. Teachers therefore need to make countless on-the-spot adjustments: differentiating, managing varying paces, and reteaching. All within limited time. The first generation of well-designed adaptive curricula is now proving to support teachers exactly at this pressure point. What convinces me most is that we can see the results in the data: sustained learning gains for students combined with reduced teacher workload. At the same time, success depends on humility in design: integrating seamlessly into classroom routines, being transparent about what the technology does and does not do, and continuously learning from evidence and practice. If we hold to that balance, evidence over opinion, EdTech can make a decisive difference, especially in times of teacher shortages."

– **Martijn Allessi** | Founder & CEO

Dutch Edtech

Energy Transition Skills.

The rapid shift to green energy in the Netherlands is creating a significant skills gap. Employers struggle to find technicians, installers, and specialists for solar, wind, grid, and circular technologies, while traditional training remains too slow and rigid. Beyond technical roles, expertise in circularity and sustainable supply chain practices is increasingly essential. Demand for green skills rises faster than supply, and current workforce readiness falls short of meeting the country's energy transition goals[1].

EdTech as a solution

- **Targeted training** – Digital certification programmes and role-specific learning modules prepare new technicians and installers to be job-ready from day one.
- **Scalable delivery** – Online platforms, VR/AR simulations, and multilingual e-learning make it possible to train large groups quickly, overcoming the limits of traditional classrooms.
- **Future-proof knowledge** – Open digital academies provide accessible courses on hydrogen, system integration, and energy innovation, ensuring continuous reskilling and interdisciplinary expertise for long-term transformation.

[1] OECD (2023). Green Skills and Jobs for the Energy Transition.
IEA (2025). World Energy Outlook 2025.













Innovation in Practice.

Inchainge

Inchainge's business simulation games equip students and professionals with supply chain and sustainability skills to succeed in a complex world and close the skills gap. Used in 700+ universities and 40% of the top 100 manufacturers, they've reached 500,000+ learners in 75+ countries, boosting collaboration, strategy, and workforce readiness for sustainability challenges.

·chapter

Chapter AI equips technicians and installers with instant, reliable answers from OEM manuals, error codes, training, and expert know-how. By making knowledge AI-ready, embedding bite-sized training, and capturing senior expertise, it accelerates workforce readiness for the energy transition. Deployments with OEMs show 50–70% ticket deflection, faster onboarding, and measurable savings within 12 months.

humbee

Interactive sustainability training for the hospitality sector, offering e-learning modules, expert-led courses, and progress tracking. Provides restaurants with sustainability assessments, improvement recommendations, and staff certifications to support greener operations.

New Energy Business School

NEBS provides education and training focused on the energy transition. Its courses, masterclasses, and online programs cover topics such as hydrogen, system integration, and sustainable energy systems. The school connects professionals from business, government, and academia to share knowledge and practical insights for a changing energy landscape.

S2S SWITCH2SOLAR Boost Your Energy Skills

Empowers professionals with online and in-person training in solar energy design and consultancy. Participants learn to assess, design, and advise on solar-power systems, with certification available through exams. The program bridges practical skills and theoretical knowledge for the renewable energy workforce.

New Energy Academy

Delivers free, interdisciplinary learning for students and young professionals on the energy transition. Its courses and lecture series cover topics such as hydrogen, system integration, and innovation—bringing together experts and learners to accelerate sustainable energy knowledge and careers.

Entrepreneurs Perspective: Energy Transition Skills





"One of the biggest challenges in the energy transition is not the technology itself, but the shortage of skilled people who can install, maintain, and troubleshoot these systems. Training alone can't keep up with the speed of change — and every time an experienced installer or service engineer leaves, a huge amount of critical knowledge is lost. Chapter AI solves this by capturing and scaling expert knowledge, making it available instantly through chatbots and AI agents. We combine verified manuals, error codes, and real-world expertise with bite-sized training videos, so every installer has guidance at their fingertips — on site, in real time. This not only reduces errors and boosts confidence in the field, but also ensures that knowledge stays within the company and grows over time. In short: we close the skills gap digitally, enabling companies to scale installations and service without scaling headcount at the same rate — so the energy transition doesn't stall on the human side."

– **Rutger Laman Trip & André Haardt** | Co-Founders ·chapter



"The vast majority of sustainability issues ultimately boil down to the supply chain, to understanding it, organizing it, and transforming it. That is where the real challenge lies for most companies, and it is also where the skills gap becomes painfully clear. We believe that every business student should learn about supply chains, and that every professional should at least understand them. Without that foundation, challenges such as carbon reduction or circularity cannot be tackled. At Inchainge, our role is to close this gap. We develop business simulation games that immerse students and professionals in realistic supply chain and sustainability scenarios, where they experience the impact of their decisions first-hand. By navigating tough trade-offs, they learn not only about supply chains, but also about alignment, collaboration, and the ripple effect their decisions have on both business and sustainability."

– **Michiel Steeman** | Managing Partner Inchainge

Workforce Shortage of Healthcare.

Healthcare systems face a growing imbalance: demand for care is rising while the supply of qualified professionals falls short. In the Netherlands, unfilled vacancies grew from ~14,500 in 2015 to ~66,000 today, with projections of 240,000 by 2034. Training and onboarding are too slow, leading to higher workloads, longer waiting times, and pressure on quality. Patient satisfaction surveys[2] highlight gaps in information, discharge, and aftercare, showing that access and experience are under strain.

EdTech as a solution

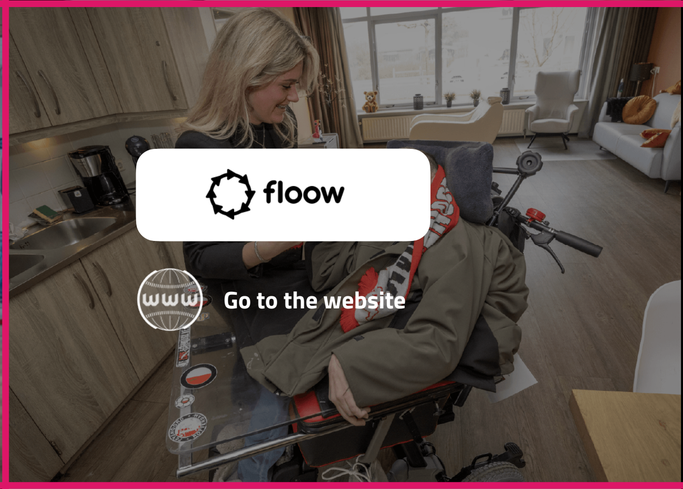
- **Faster tailored support** – Adaptive systems make personalised learning scalable, ensuring every pupil gets the right challenge at the right time.
- **Faster qualification** – Competence platforms give trainees clear progress tracking, opportunities for reflection, and real-time feedback, accelerating the development of skilled professionals.
- **Smarter practice** – Interactive simulations and serious games let healthcare workers safely and repeatedly practise procedures, improving retention and ensuring readiness for clinical work.
- **Flexible upskilling** – Accredited online courses and micro-learning modules allow staff to refresh and update skills anytime, speeding up onboarding and reducing training bottlenecks.
- **Reduced workload** – Digital tools that automate administration and scheduling free up staff time for patient care, directly addressing burnout and making jobs more sustainable.
- **Better graduate preparation** – Integrating EdTech into medical education ensures new professionals enter the workforce with stronger, practice-ready skills.

[2] NFU's Patient Experience Monitor, Ziekenhuischeck













Innovation in Practice.

RECONCEPT_

The Reconcept app streamlines workplace learning by automating feedback and mentoring, reducing trainers' admin load while fostering targeted reflection and deeper learning with AI. Built on Entrustable Professional Activities, it enables faster deployment of medical professionals without compromising healthcare quality, ensuring effective, scalable training in critical settings.

LEARNINGGAMES.IO THE SERIOUS GAME PLATFORM

The Virtual E-Learning platform uses real-life simulations and 360° environments to train 5,000+ nurses in the Netherlands, saving thousands of classroom hours and speeding up tech adoption in healthcare. With VR and XR extensions, it brings training closer to real-world practice, creating immersive, impactful learning that helps address workforce shortages.

floow

Floow.ai shortens healthcare learning pathways by up to 50% by recognizing prior skills with AI, reducing training time, dropout rates, and admin burden for supervisors. At Zadkine, a student completed nursing assistant training in 9 months instead of 3 years. Pilot results show 30–50% faster programs with less admin load, enabling thousands to enter the workforce sooner.

Go to case study

LEQUEST

Creates interactive, simulation-based training for medical devices, helping healthcare professionals learn safe and effective device use through realistic, scenario-driven modules. By improving onboarding and compliance, LeQuest reduces user errors and supports hospitals in delivering safer, more efficient patient care.

MEDICAL·X

Provides immersive simulation training for healthcare professionals, combining realistic clinical scenarios with digital learning tools. The platform enhances practical skills, improves knowledge retention, and reduces medical errors—contributing to higher-quality care and greater confidence in clinical practice.

elevate

Develops digital and blended learning programs that strengthen knowledge and skills in healthcare and life sciences. By combining academic expertise with practical training, Elevate supports professionals worldwide in improving patient care, advancing research, and addressing global health challenges through accessible, high-quality education.

Entrepreneurs Perspective: Workforce Shortage of Healthcare.



"What I see every day is that the shortage of healthcare workers is not just a number in a report; it's a lived reality. Patients wait longer, colleagues are overworked, and talented people who want to contribute often drop out because the system isn't built for them. Many of these professionals are hands-on learners: they thrive in practice, not in classrooms filled with paperwork and rigid timelines. Yet they remain invisible in most digital innovation. We really try to give them a voice and a pathway, by making learning fit around their work and existing skills. For me, the challenge is not only to fill vacancies faster, but to value this workforce for who they are and what they bring. If we succeed in that, we can prevent a healthcare collapse and build a system that is fairer, more humane, and future-proof."

- Elise Spaan | Founder

floow



"Working in medical education, both our learners' and trainers' primary focus is providing healthcare, as it should. Even though they generally agree that collecting feedback and setting personal goals improves development, this is not usually top-of-mind. The challenge we face is providing tools that are as seamless, unobtrusive, encouraging and rewarding as possible. When we started out, the best way to do this was to provide a user-friendly mobile app. Now, the AI revolution allows us to take the next step by providing speech-to-text feedback recording and introducing a virtual coach that guides and motivates learners."

- Jürgen Visser | Founder

RECONCEPT_

Dutch Edtech

Accessibility of Education.

Learners with diverse abilities, linguistic backgrounds, or limited resources often face barriers that hinder full participation in education. Traditional methods fail to address these varied needs. The real challenge is ensuring equitable access to the right type of education: personalised, inclusive, and adapted to each learner's circumstances, background, and location.

EdTech as a solution

- **Support for disabilities** – Tools with built-in accessibility features (e.g. text-to-speech, screen readers, adaptive layouts) ensure learners with dyslexia, visual impairments, or other challenges can fully participate.
- **Language inclusion** – Digital platforms offering translation, speech-to-text, and tailored language learning help migrant and multilingual learners integrate more effectively.
- **Low-resource access** – Offline functionality, mobile-first design, and lightweight apps make education possible even in areas with poor connectivity or limited resources.
- **Lowering financial barriers** – Platforms that reduce costs of study materials or provide alternative routes to higher education make quality learning accessible to more students.

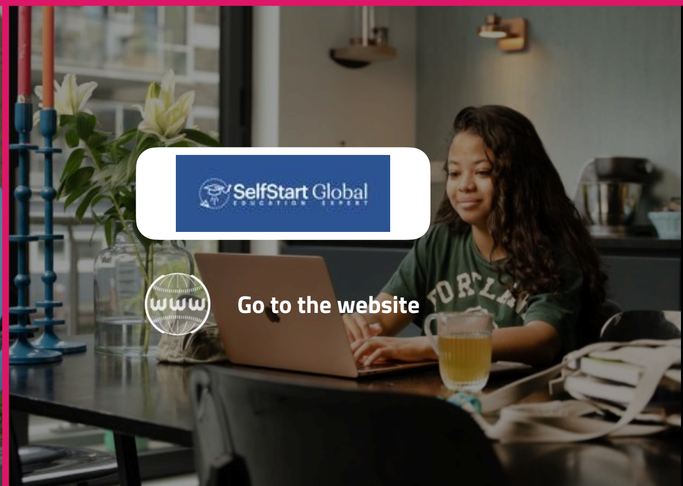












Innovation in Practice.

CHANGEFIED
GAMIFIED SOCIAL SOLUTIONS

Changefied's Virtual OV is a VR platform that helps neurodivergent students in special education safely practice public transport skills. Through realistic, gamified training, it builds confidence, executive functions, and independence. Since 2022, ~2,500 students at 50 Dutch schools have trained with it, showing improved travel skills and self-reliance, supported by funding from Noord-Holland.

Go to case study

TextAid by ReadSpeaker

Offers text-to-speech technology that supports learners with dyslexia and other reading challenges. By enabling users to listen to written content, TextAid enhances reading comprehension, focus, and independence—making learning more accessible and inclusive for students across different education levels.

Taaly

Supports newcomers in learning Dutch through AI-powered language coaching and live conversation practice with native speakers. The platform focuses on building confidence and fluency in real-life contexts, accelerating integration and access to education, work, and social participation in the Netherlands.

basisschool online

Provides flexible, digital primary education designed to make learning accessible to every child. The platform offers a structured online curriculum, interactive lessons, and personal guidance, helping students continue their education remotely—particularly useful for children who cannot attend a traditional school.

BUKU

Offers a subscription-based digital library that provides students with affordable and unlimited access to study materials. By replacing expensive textbooks with a flexible digital model, BUKU supports equal learning opportunities, helping students worldwide access quality educational content anytime and anywhere.

SelfStart Global

SelfStartGlobal is an EdTech platform that makes international education accessible and affordable. In the 2025 cohort, 94% of students guided by its algorithm were admitted abroad and 90% received scholarships—most exceeding service costs. This proves its impact: students from diverse backgrounds gain admission and financial support to pursue global education opportunities.

Entrepreneurs Perspective: Accessibility of Education.



"Every week I see how young people, especially those with special needs, struggle to find their way in our fast-moving daily life. For many of them, even simple everyday activities can feel overwhelming without the right preparation and support. With our Virtual Reality solutions we aim to bridge that gap by offering a safe, immersive space where mistakes are allowed and confidence can grow. It is inspiring to witness how these small steps in VR translate into real progress and independence in real life, for both the students and the people around them."

- Tim van Dam | CEO

CHANGEFIED
GAMIFIED SOCIAL SOLUTIONS



"Access to international education is often overlooked as a global challenge. For most students, one degree abroad costs $50K to $400K, which is far beyond reach. On top of that, only 3% to 10% of applicants are admitted to top universities, making the process both expensive and extremely competitive. Our mission is to change this by making education abroad affordable and accessible through scholarships and clear expert guidance, enabling students to cut costs by up to 100% from their very first application. Talent should define opportunity, not financial status."

- Radmila Tsineman | CEO & Founder

SelfStart Global

Dutch Edtech

Teachers Under Pressure.

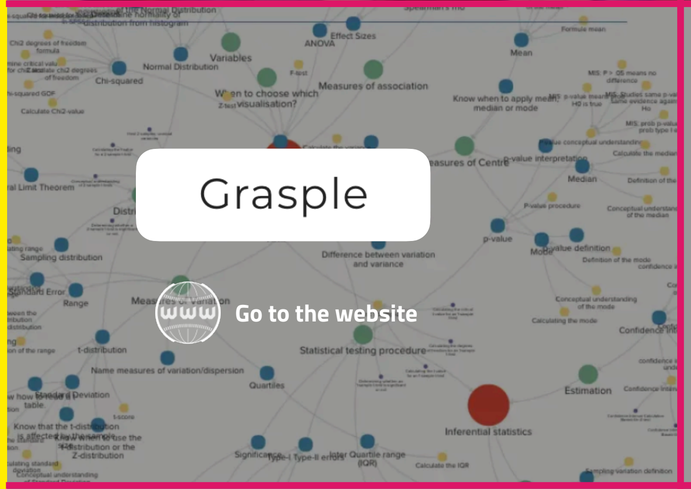
In Higher Education, teachers face mounting digital fatigue, limited institutional support, and rising administrative burdens. Time meant for teaching and research is consumed by planning, coordination, and compliance tasks. With professional development fragmented, faculties struggle to adopt new methods. Educators are stretched thin, unable to scale high-quality teaching, leaving students with inconsistent and less personalized learning experiences.

EdTech as a solution

- **Simplify planning & teaching** – Dashboards and classroom management tools help structure lessons and improve efficiency.
- **Automate routine tasks** – Administrative tools and AI-supported class generators reduce preparation time and lighten workloads.
- **AI-generated classroom content** – Tools that automatically design lesson plans, exercises, and assessments save valuable time and ensure materials are tailored to student needs.
- **Support professional growth** – Online training and development platforms provide accessible, tailored learning opportunities for educators.













Dutch Edtech

Innovation in Practice.

Eduface

Eduface supports higher education teachers with an AI feedback model trained for academic contexts, enabling faster, higher-quality feedback on student work. In a case study at Rotterdam University of Applied Sciences, lecturers reported that feedback which normally took 45 minutes could be produced in just 15 minutes, significantly improving efficiency without compromising quality.

Go to case study

FeedbackFruits

FeedbackFruits eases institutional pressure by automating grading, feedback, and course setup, while ready-made designs simplify activity creation. Educators save hours and gain time for teaching, as shown in pilots at Texas A&M and University of Arizona, where faculty reported faster workflows and students highlighted stronger engagement, satisfaction, and lifelong skill development.

Case study Texas

Case study Arizona

Grasple

Grasple reduces lecturers' workload with adaptive, community-curated materials that use Knowledge Graphs to identify student gaps and deliver tailored practice with feedback. By reusing high-quality OER, students arrive better prepared, allowing educators to focus on teaching, mentoring, and research instead of reworking resources or reteaching basics. Evidence is shown in multiple Grasple customer stories.

Go to case study 1

Go to case study 2

DRIEAM

Portflow by Drieam helps shift HvA from task-driven teaching to development-oriented learning by giving students ownership and streamlining assessment and feedback. Integrated in the LMS and used by 10,000+ learners across 60+ programs, it reduces teacher workload, improves visibility of outcomes, and boosts engagement. Co-creation delivered 25+ new features, including AI-supported feedback analysis.

Go to case study

TRAINTOOL

practice, practice, proof

Provides a digital platform that helps teachers and students in higher education develop communication and coaching skills through video-based practice and feedback. By simulating real-life conversations, TrainTool supports more effective teaching, assessment, and professional development, enhancing both educator confidence and student engagement.

LearnWise

LearnWise AI reduces faculty digital fatigue by automating routine student queries and admin tasks, while embedding AI tutors and feedback tools in the LMS. In JISC pilots across 12 UK institutions, it resolved up to 99% of queries, cutting Tier-1 requests by 30–40%. Staff reported clearer capacity to focus on teaching, research, and mentoring, while students gained consistent, personalized learning support.

Go to case study

Entrepreneurs Perspective: Teachers Under Pressure



"With Knowledge Graphs making learning paths transparent, students arrive better prepared and lecturers are freed from endless recaps, allowing higher education to maintain quality while scaling to larger and more diverse student groups. Our mission is to make STEM accessible for all who want to learn: it is not only about offering free materials, but about providing the structure and didactic strategies developed by teachers, while Grasple takes care of the rest."

– **Elisabeth Schmoutziguer Bender** | CEO

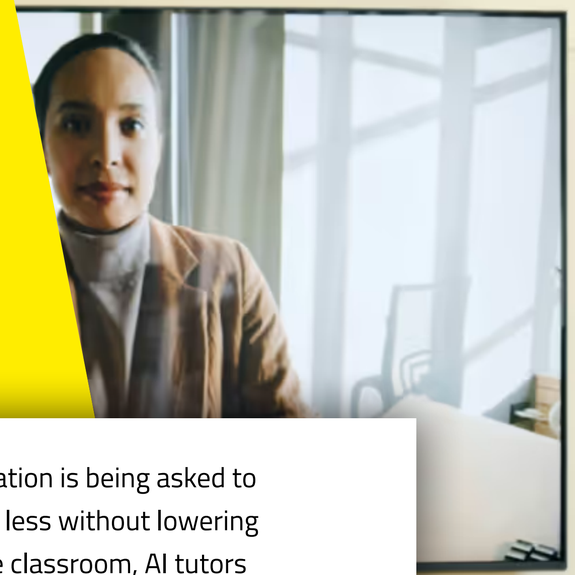
Grasple



"Higher education is being asked to do more with less without lowering the bar. In the classroom, AI tutors and feedback tools help students prepare better and let academics focus on moments that require judgment and care. Beyond the classroom, the same AI quietly resolves routine queries and workflows so services stay responsive as institutions scale. When we automate the predictable, so that educators can invest their attention into what really matters most."

– **Greg Marshall** | CEO

LearnWise





EdTech and Societal Challenges

Every Societal Transition is a Learning Transition.

Education is struggling to keep pace with a world in constant motion, shaped by AI, climate transition, and shifting demographics. In this new reality, EdTech has become the backbone of adaptation: it makes learning flexible, data-driven, and deeply personal, helping societies build the skills needed to stay resilient and innovative.

It transforms education from a one-time phase into a continuous, lifelong journey, where everyone can learn, adapt, and thrive.

The Netherlands now stands at a strategic crossroads.
To remain sovereign, sustainable, and inclusive, the country must strengthen its EdTech ecosystem. By closing foundational learning gaps through adaptive innovation and powering the energy transition through large-scale reskilling, the Netherlands can build a globally competitive, impact-driven knowledge economy.

Because EdTech is how the Netherlands learns to lead.

Foundational Education in Crisis

Dutch pupils are falling behind while teacher shortages deepen the gap.
EdTech can rebuild the foundation, making personalised learning scalable, engaging, and effective at last.

Energy Transition Skills Gap

The green transition is stalling on a shortage of skilled workers. EdTech delivers fast, targeted, and scalable training to power the shift to a sustainable economy.

Workforce Shortage of Healthcare

Healthcare is under pressure as vacancies soar and training lags behind demand.
EdTech accelerates qualification, relieves workload, and helps professionals stay skilled and resilient.

Accessibility of Education

Too many learners are still excluded by language, ability, or limited access.
EdTech breaks these barriers through inclusive, affordable, and flexible learning for all.

Teachers Under Pressure

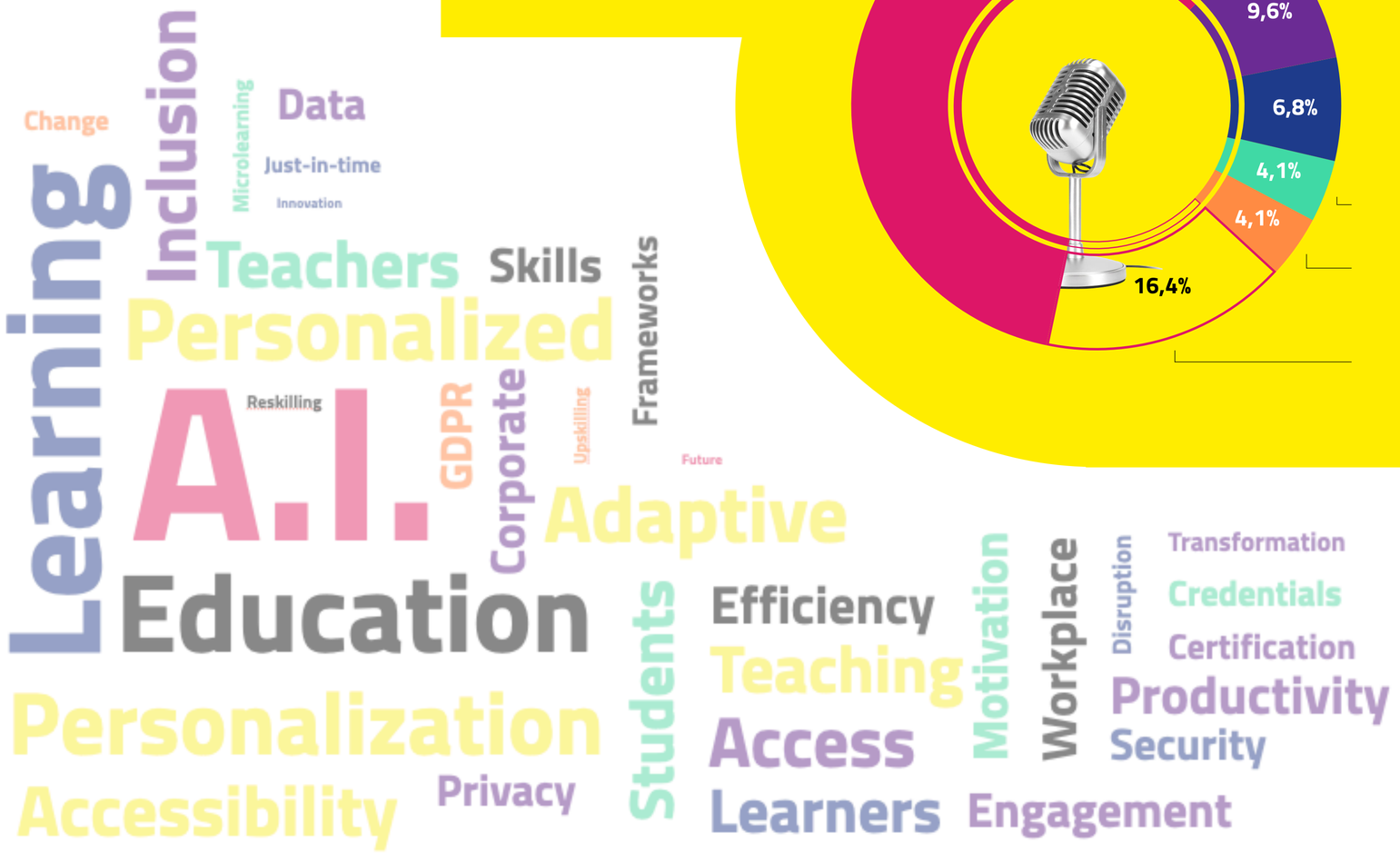
Educators face digital overload, heavy admin, and fragmented support.
EdTech empowers them with smart automation, better tools, and continuous professional growth.

Founders Vision.

- Founders Voices on What’s Next in EdTech.
- AI in education
- Motivational learning and engagement
- Data and privacy for learners
- Cluster and collaboration network
- Frameworks and certifications



What's Next in EdTech?



Themes with the biggest impact on the EdTech sector according to the founders.

Source: *Dutch Edtech Foundation-Members' Survey '25*

What's Next for Edtech: Founders Voice

AI makes learning personal and seamless

"AI will redefine how education is delivered—shifting from one-size-fits-all content to adaptive, contextual, and continuous learning experiences. Especially in the workplace, AI enables just-in-time microlearning, tailored to individual needs and delivered in the flow of work. This not only enhances learning retention but also democratizes access to skill development without needing to leave your tools or workspace."

AI reshapes teaching: less prep, more diversity, bigger projects.

"This is the year that AI products for education are starting to mature, and with it, the first year that the impact will be felt on the school and teacher side, rather than only the student side. That means it will not only change learning practices, but also teaching practices. AI has several ways in which it can change teaching practices: it enables more diversity in activities by reducing time investment in lesson prep, it enables easier differentiation and ups the bar for the complexity of projects students can undertake."

AI makes learning personalized, real-time and actionable.

"As we look ahead to 2026, it's clear that Artificial Intelligence will be the single most transformative force in education technology. At Lepaya, we believe the true power of AI lies not just in automation, but in personalization at scale. We're moving away from one-size-fits-all learning journeys toward intelligent, adaptive systems that understand individual learner needs in real time."

"In the past, corporate learning often meant mandatory modules and static content. In 2026, AI flips that script. It empowers employees with the right skills at the right moment, informed by real performance data, learning behaviors, and organizational context. AI tutors, real-time feedback, personalized nudges, and skills gap analysis will no longer be innovations - they'll be expectations."

"We are already seeing the early benefits: better engagement, faster upskilling, and, most importantly, stronger business outcomes. But this is just the beginning. The biggest impact in 2026 will come from AI's ability to bridge the gap between learning and application, making learning relevant, timely, and deeply human despite being driven by machines."

"EdTech companies that harness AI ethically, transparently, and with a laser focus on real skill development will shape the future of learning."

AI breaks one-size-fits-all, making learning personalized and inclusive.

"AI is fundamentally reshaping how children learn, and it's our responsibility, and opportunity, to guide this transformation. The reason AI matters most in education is that it enables us to finally break away from one-size-fits-all models and empower every child to grow."

"How it changes delivery and access Learning is evolving, and we're leading that change by combining the best of AI with the deep expertise of our people to shape the future of personalised learning for the next generation. With the help of AI learning becomes more personalised and more inclusive."

What's Next for Edtech: Founders Vision.

Personalized learning

"What used to be the wholly grail in education - truly personalized learning - has never really been possible, until now."

AI's impact comes from connected collaboration.

"From what we've seen, education is super sensitive to disruption—especially when teachers are asked to change the way they work or use tools that feel too complex, like AI. If new tech doesn't fit smoothly into what schools already use, it just doesn't stick."

"That's why collaboration between EdTech players is so important. It's not about building the next big standalone tool—it's about creating smart, connected solutions that work with the existing ecosystem."

"In 2026, the real impact will come from partnerships and networks that help schools adopt new tech without friction. The winners won't be the loudest—they'll be the ones who play best with others."

AI in education demands privacy and security.

"It's obvious that AI will be a big gamechanger in education. But privacy and security are the basics for the use of AI and EdTech in general. The proof is in the pudding. Only European (in case of Prowise, Dutch) developments with independent certifications, can really confirm and assure the privacy and security of learners (teachers, students, and all other type of users) while using the hardware and software in the classroom."

Tool adoption is key

"People have access to incredible tools. The problem now becomes ensuring that these tools are actually used, enjoyed, and appreciated by educators and learners."

Engagement secures learning impact.

"Engagement is crucial for learning to have real impact. In the potentially worsening economic conditions, the proven impact of learning is necessary to avoid being cut away."

Closing Remarks



Friends & Founding Partners of Dutch Edtech.

Founders of Dutch Edtech

Ministerie van Economische Zaken en Klimaat

Ministerie van Onderwijs, Cultuur en Wetenschap

GrowthTribe

itorium

marineterrein amsterdam

startup amsterdam
By the City of Amsterdam

Friends of Dutch Edtech

ROM Utrecht Region

NOLAI NATIONAAL ONDERWIJSLAB AI

EUROPEAN EDTECH ALLIANCE

AIC4NL

rubio impact ventures

Npuls

Authors and Methodology.

Data Sources and Validation

The Dutch EdTech ecosystem currently consists of 507 active companies. For certain analyses (such as investments or segments), subsets of this total were used, as not all companies have complete data available.
Our analysis combines multiple sources:

- **Dutch Edtech Foundation Database** – The foundation maintains an up-to-date database of Dutch EdTech companies, complemented by the Members' Survey 2025 (73 respondents).
- **Dealroom / ROM Utrecht Region** – Funding and valuation data were derived from Dealroom, in collaboration with ROM Utrecht Region, and enriched with additional checks against company websites and press releases.
- **Cross-validation** – For valuation per market segment, we used only companies categorized as *operational, low activity, or acquired (NL)*, which leads to some differences compared to the aggregated Dealroom valuation. For international comparisons, we use Dealroom totals to ensure consistency.
- **Investment Rounds** – Venture capital data follows Dealroom conventions: acquisitions are not counted as investment rounds. Notable acquisitions are listed separately. Companies without a Dutch HQ (e.g., Tech 'n Leap, based in Ireland) were excluded from the investment totals.

While every effort has been made to ensure accuracy, differences in methodology across data providers mean that the numbers represent the best available estimates.

Acknowledgements

This report is the result of a joint effort of the Dutch EdTech Foundation and its partners. We gratefully acknowledge the valuable contributions of **ROM Utrecht Region**, in particular *Isabella Magnanti* and *Annet Kloprogge*, for their collaboration in analysing and validating Dealroom data.

From the **Dutch Edtech Foundation**, we thank *Buket Aksoy*, *Jitske van Os*, and *Roel Bellinga* for their input and support throughout the process. Special thanks also go to the 73 entrepreneurs who responded to the **Members' Survey 2025**, enriching the dataset with their insights.

Finally, we thank *David Brinkman* for the design and layout of this report, and the board members of Dutch Edtech team for their guidance and dedication.

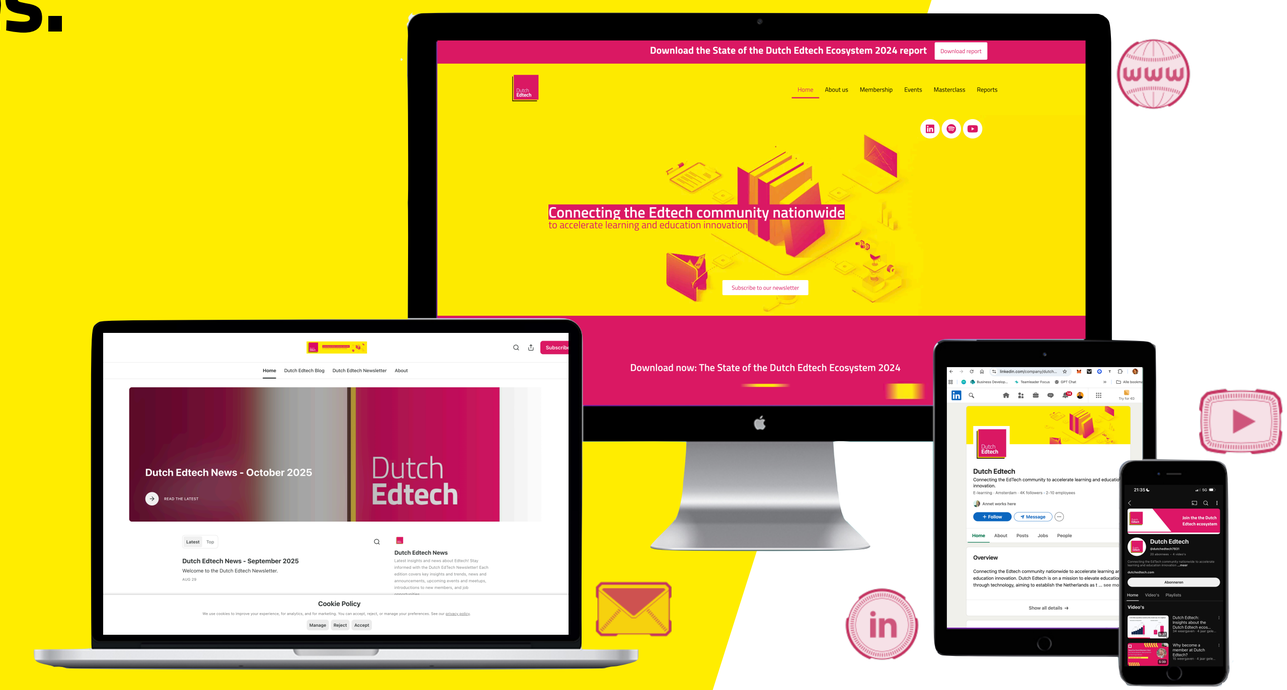
Stay connected for the latest insights and updates.

Subscribe to our newsletter and new blog for the latest trends and innovations:
www.dutchedtech.substack.com

Follow us on LinkedIn for real-time updates:
www.linkedin.com/company/dutchedtech

Find out more about the sector, becoming a member or partner, and our initiatives like the masterclass Evidence-Based Learning Engineering:
www.dutchedtech.com

Have any thoughts or questions?
We'd love to hear from you!
Feel free to reach out at info@dutchedtech.com



Connecting the EdTech community nationwide to accelerate learning and education innovation

Dutch Edtech

The State of the Dutch EdTech Ecosystem





Thought Leaders

ROM Utrecht Region