UNLOCKING THE NETHERLANDS' AI POTENTIAL 2025

Introduction

Dutch businesses continue to embrace artificial intelligence (AI), with a new company adopting the technology every four minutes over the past year. As AI adoption across the Netherlands continues to accelerate, the country is solidifying its position as a European leader in AI.

The number of firms that have adopted AI has risen to **49%**, demonstrating a growth rate of **23%** from last year. This puts the Netherlands significantly ahead of the European average of **42%** of businesses who have adopted AI, highlighting its strong momentum in embracing AI-driven innovation.

The successful adoption of AI runs across the Dutch business community from startups to micro-enterprises and large enterprises, with each pioneering AI in their own way:

- For businesses that have adopted AI, a striking majority (**88%**) report increased revenue (on average **27%**) as a result. **71%** have seen significant productivity gains, especially from streamlined data analysis (**54%**), the automation of routine tasks (**46%**), and improvements to customer service (**44%**).

- These strong results are attracting rising investments in AI - Dutch businesses report increasing their investments in AI by **20%** in the past year.

- Startups[1] are pioneering advanced uses: **33%** of startups are leveraging AI for its most advanced uses, compared to **26%** across Europe. This includes harnessing the most advanced AI systems that combine multiple types of AI tools or models to perform complex tasks.

- Large enterprises[2] are deeply integrating AI into their business, more so than their European counterparts. **19%** have fully integrated AI into the core of their operations, compared to only **3%** of large enterprises across Europe.

- Additionally, **61%** of microenterprises[3] that have adopted AI are using it only for more basic purposes, such as using publicly available chatbots and purchasing ready-made AI solutions.

The Dutch public is as enthusiastic as businesses, with citizens seeing significant potential for the technology in critical public services like education and healthcare.
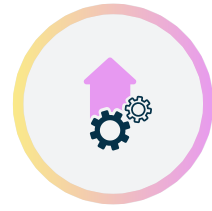
The success of strong AI adoption in the Netherlands can be attributed to a number of factors:
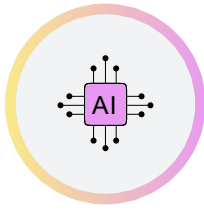
A strong base of large enterprises driving AI uptake and using AI for advanced purposes

Microenterprises that are willing to experiment with AI's use and realise significant benefits as a result

Startups that are driving innovation and using the technology for complex tasks

This momentum has additionally been influenced by the Netherlands' early leadership in 2019 in setting out a Strategic Action Plan for Artificial Intelligence. The plan outlines the Netherlands' commitment to leveraging AI for societal challenges and economic growth, through efforts such as an emphasis on public-private partnership through the creation of the Netherlands AI Coalition to enhance synergies between research, education, and organisations. This early recognition laid the groundwork for public and private sectors in the Netherlands to explore and embrace AI's potential, ahead of European peers, creating a fertile environment for innovation.

The Netherlands is at a critical moment in its digital transformation journey. As businesses increasingly turn to AI to drive productivity and innovation, the country can solidify its position as a leader in the European digital economy. Now, the Dutch government has shared its ambition to establish a strong AI ecosystem in both the Netherlands and the EU, recognising AI as a key driver of future economic growth and innovation. Delivering on these efforts is now crucial, as rapid developments in AI continue to reshape industries and unlock new opportunities. While AI holds immense promise for productivity, efficiency, and innovation, ensuring widespread adoption and deep integration will be key to maintaining the Netherlands' competitive edge in the digital economy.

To fully unlock AI's potential and maintain its leadership position, the Netherlands must address key barriers to AI adoption, ensuring that it moves beyond surface-level implementation to drive real, long-term impact across industries.

Key findings:

- In the Netherlands, AI adoption is widespread and accelerating, with **49%** of businesses now using AI, marking a **23%** growth in just one year (up from **40%** last year). This totals around 180,000 businesses – or between 3 and 4 businesses every 10 minutes in the last year.

- The nation continues to outpace the European average of **42%** AI adoption. However, the growth rate of adoption (**23%**) slightly trails the European rate of **27%**.

- Businesses that adopt AI are seeing clear benefits. **88%** of Dutch businesses report an increase in revenue thanks to AI adoption, with an average increase of **27%**, attesting AI's power in driving businesses' competitiveness.

- Businesses also report a **20%** increase in investment in AI over the last year – on par with the European average of **22%**.

- **19%** of large enterprises have taken steps to fully integrate AI, compared to the European average of **3%.**

- Startups are pioneering AI innovation, with a third (**33%**) leveraging AI for advanced purposes, ahead of the European average of **26%**.

- Despite this momentum, barriers remain, with **45%** of Dutch businesses saying a lack of digital skills is holding back deeper AI adoption, and **50%** of startups cite enabled access to funding as crucial for their scaling and innovation. A further **77%** of Dutch businesses do not understand their roles and responsibilities under the EU AI Act.

Large enterprise adoption is deep and transformative

In the Netherlands, large enterprises are leading in the full integration of AI, where businesses have embedded the technology into the core of their operations and strategies. A notable **19%** of Dutch large enterprises report having fully integrated AI into their core operations, compared to just **3%** of their counterparts across Europe. This sharp difference highlights how Dutch enterprises stand out in embedding AI deeply into business strategy and daily operations.

This contrasts the broader European trend, where startups, not large enterprises, are typically leading in AI integration. While **18%** of startups across Europe have fully integrated AI, only **11%** of Dutch startups report the same. In the Netherlands, it's the large enterprises that harnessing AI for transformation.

Large enterprises are also striving to get the most from their AI investments; **83%** of large enterprise adopters in the Netherlands have invested specifically in hiring AI-skilled personnel, compared to **29%** of all businesses across the Netherlands and **39%** of all businesses across Europe.

This deep adoption is key to unlocking the full benefits of AI for the Netherlands' economy and society. Research by the Telecoms Advisory Service, commissioned by AWS, shows that cloud-enabled AI contributed more than $2.3 billion to the Dutch GDP in 2023 alone. Looking ahead, AI's potential is even greater. By 2030, cloud as a whole is expected to add $2.6 trillion to Europe's GDP, with $434 billion of that driven by cloud-enabled AI. For the Netherlands, continued leadership by its large enterprises could play a key role in realising this economic potential.

Startups and microbusinesses: Untapped potential

Dutch microbusinesses (9 or fewer employees), which make up the majority of the Dutch business ecosystem, and Dutch startups also present huge untapped potential, if key barriers to adoption can be removed. With the right support, they can go further and faster in realising the benefits of the technology.
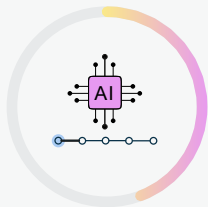
**Current trends highlight both promise and challenges:**
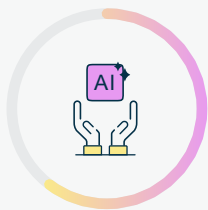
61% of microbusiness AI adopters are still exploring AI, experimenting with more basic uses such as ready-made AI solutions and using chatbots for individual tasks.
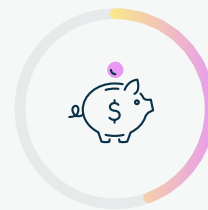
45% of microbusinesses report having dedicated AI budgets, compared to just **29%** across Europe, showing a strong willingness to invest.

45% of Dutch startups remain at the basic stages of AI use.
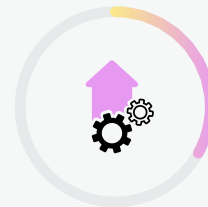
33% of startups are using AI at the most advanced levels including combining multiple models for complex tasks. When startups are given the right tools, they are going all-in on AI and realising the benefits.

This shows significant promise, but both microenterprises and startups need more support to enable them to fully benefit from AI's transformative potential. In the current landscape, key barriers continue to restrict their growth, making it increasingly difficult for them to grow and compete on a European and global stage.

Microenterprises report facing higher barriers to scaling their AI use and adoption than their larger counterparts, directly impacting their ability to implement the technology:

- **55%** of micro-businesses identify skills as a key barrier to deeper AI adoption, compared with **45%** of Dutch businesses as a whole.

- Cost is the number one barrier for microbusinesses, with **38%** describing it as a key barrier to adopting or expanding their use of AI, compared to **33%** for Dutch businesses as a whole. However, while these perceived costs can deter adoption, businesses often see significant productivity and revenue gains once they integrate AI effectively, with over seven-in-ten adopters reporting productivity gains and **88%** reporting increased revenues.

Dutch startups echo similar concerns:

- A lack of digital skills, highlighted by **53%** of Dutch startups compared to **12%** for all startups across Europe.

- The cost of implementing AI, cited as a barrier by **40%** of startups compared to **33%** for all businesses. Given the cost savings and revenue benefits reported by AI adopters, ensuring sufficient access to finance could help more startups successfully take advantage of AI technologies.

- Higher-than-average compliance costs, as startups estimate that €39 out of every €100 they spend on tech goes towards compliance-related costs. This is higher than the average across the Netherlands of €35, and in line with the overall European average of €40 out of every €100.

- Limited access to funding is a key barrier. Among those Dutch startups who consider Europe uncompetitive as a global hub for startups, **32%** cite difficulties accessing growth funding and venture capital as a primary concern. This is echoed in The State of Dutch Tech 2025 report, which found that early-seed funding remains the most critical challenge for Dutch startups.

- Furthermore, **42%** of Dutch businesses that view Europe as uncompetitive cite that difficulties in scaling are a key reason for its lack of competitiveness.

As a result, in the Netherlands, only **11%** of startups have reported full AI integration, compared to **19%** of large enterprises. A pro-growth, pro-startup investment climate is necessary to encourage AI adoption and digital transformation. This gap highlights a concerning trend: while larger firms are integrating AI into the core of their operations, startups, despite their agility and innovative potential, are facing restricted growth.

Key challenges are preventing Dutch businesses from unlocking the full potential of AI

Three key challenges are holding businesses back from adopting AI, and once adopted, from innovating successfully:

Barriers to accessing capital:

- Dutch startups in particular report that they face challenges in securing funding. Among Dutch startups who consider Europe uncompetitive as a global hub for startups, **32%** cite difficulties accessing growth funding and venture capital as a primary reason for its lack of competitiveness. Without the right financial backing, the Netherlands risks missing out on becoming a leader in AI innovation.

- **50%** of startups say that greater access to venture capital and funding options is a top priority to support their scaling.

The digital skills gap:

- AI literacy is set to become a fundamental requirement for the workforce, with **49%** of new jobs in the Netherlands expected to demand AI-related skills within the next three years. Despite this, only **23%** feel prepared.

- **45%** of Dutch businesses identify skills as a barrier to deeper AI adoption, and **49%** say that a lack of skills is hindering innovation.

- **45%** of Dutch businesses say they struggle to attract the talent with the necessary digital skills, and are, in turn, willing to offer premiums for candidates with strong AI skills – at an average of a **35%** salary increase.

Limited cross-border scaling:

- Even when Dutch businesses are innovating and leveraging AI throughout operations, scaling their success across Europe remains a challenge.

- **42%** of businesses that view Europe as uncompetitive for startups cite difficulty scaling across EU borders as a key reason, more than double that found across Europe (**17%**). This friction limits growth opportunities and dampens the ambition of businesses seeking to operate on a pan-European scale.

These barriers are acting as a handbrake on the speed of digital transformation across the Netherlands. Addressing these challenges is essential to unlocking AI's full economic potential and ensuring that the Netherlands remains a leader in the next wave of technological transformation.

The Netherlands can be a model for Europe, but momentum must be maintained

The Netherlands has all the right tools to excel as a leader in the AI space. For Dutch and European policymakers and industry leaders, considering the following steps is crucial to unlock the full potential of AI across both fast-paced start-ups, microenterprises, and larger enterprises:

1. Enable accessible funding for startups and AI-focused companies

While a small group of startups are leading the way in AI adoption, using it in the most advanced ways, Dutch startups are facing challenges seeking out funding that enables their growth, as the State of Dutch Tech 2025 report points out that they lack the capital intensity seen in more heavily funded markets, limiting their ability to scale rapidly. The Dutch government must take decisive action to increase access to venture capital and growth funding, ensuring startups and AI-driven businesses have the financial resources to scale, and work to incentivise innovation for innovation.

2. Accelerate digital transformation across industries through skills development

To accelerate private-sector digital adoption, the Netherlands should foster a cycle of investment and growth centred on digital transformation and developing a highly skilled workforce, as **87%** of businesses see AI skills as critical in the next five years. A third (**33%**) of businesses also indicate that widespread availability of training and support would make AI tools more accessible to their industry. Building a digitally-skilled workforce requires the implementation of a revamped, clear, and pro-growth Dutch Digitalisation Strategy in 2025 that is continuously updated to harness the rapid momentum behind AI.

3. Create a pro-growth environment that facilitates scaling across borders

Dutch businesses face difficulties scaling across borders and are restricted by a lack of a skilled workforce, limited funding access, and a complex regulatory environment. While the Netherlands has a vision to enable "safe and equitable generative AI" and to create a Regulatory Sandbox, businesses continue to find that regulation remains unclear, and they are expecting an increase in compliance costs. Currently, **77%** of Dutch businesses do not understand their roles and responsibilities under the EU AI Act, and businesses estimate they spend **35%** of their tech spend on compliance, and **67%** expect this figure to increase.

The Netherlands has made impressive strides in AI adoption, outpacing much of Europe in both enthusiasm and early success. From startups to large enterprises, Dutch businesses are seeing real benefits from increased revenue to improved productivity. To sustain this momentum and secure long-term leadership in AI-driven innovation, targeted action is needed. Addressing barriers to funding, skills, and scalability, especially for startups and microbusinesses, will be key to unlocking AI's full potential across the economy. With the right support, the Netherlands can lead not just in adoption, but in shaping the future of AI in Europe.

Appendix

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In the Netherlands:

- We conducted a survey targeting 1,000 nationally representative members of the public, ensuring representation based on age, gender, and NUTS 1 region.

- Additionally, we surveyed 1,000 business leaders, representative by their business size, sector, and NUTS 1 region.

Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

Weighting Techniques:

Post-data collection, we applied iterative proportional weight to correct any discrepancies or over-representations in the sample.

Survey:

- Usage Patterns: This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.

- Perceptions and Attitudes: The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions

- Barriers and Opportunities: The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.

- 'Size of the Prize': The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References

1. A business founded in the last 2 years which provides a new product/service or innovation and is aiming for rapid growth in terms of employees and turnover.

2. A large enterprise (also referred to as a large business or established enterprise) is a business with 500 or more employees, founded 10 years ago or more.

3. A microenterprise is a small business with 9 or fewer employees.