



UNLOCKING THE NETHERLANDS' AI POTENTIAL 2026

The next wave of AI is here – the Netherlands must act to harness its impact

The Netherlands stands at a pivotal moment in the evolution of artificial intelligence. Having established itself as one of Europe's leading AI economies, with strong adoption rates (**61%**) and advanced digital infrastructure, the country is well-positioned to benefit from the next wave of innovation. But as AI enters a new phase, defined by agentic systems, advanced robotics, and increasingly autonomous technologies, the question is no longer simply who adopts AI, but who is ready to harness its full potential.

This next generation of AI represents a steep change in capability. It is reshaping how businesses operate, compete, and scale. For early adopters, these technologies offer the opportunity to move beyond incremental gains toward true transformation, compressing innovation cycles from years to months.

Yet readiness for this shift remains uneven. While many Dutch businesses have adopted AI, most are still using it in limited or early-stage ways. Fewer have moved toward more advanced use cases, where AI is embedded across operations and driving transformation. As next-generation AI tools continue to develop, this gap between early adopters and more advanced users risks widening.

Encouragingly, the Netherlands has many of the ingredients needed to lead in this new era: a highly digitalised economy, strong cloud adoption, and a dynamic startup ecosystem that is already pushing the frontier of advanced AI use. But translating these strengths into sustained leadership will require ensuring that businesses of all sizes have the readiness through skills, resources, and operating environment to scale AI effectively and harness its potential for transformation.

The opportunity for the Netherlands is clear: to convert rising adoption into broad-based AI transformation across sectors, regions, and businesses of all sizes. Achieving this will require the right conditions for scale – including stronger skills pipelines, improved funding pathways, streamlined regulation, and a pragmatic approach to digital sovereignty that preserves openness, flexibility, and access to global technologies.

Key findings

61%

of businesses have adopted AI, up from **49%** last year. This is a growth rate of **24%**, slightly ahead of last year's **23%** and broadly in line with the European growth rate of **29%**. Crucially, the Netherlands remains well above the European adoption rate of **54%**, reinforcing its position as one of the continent's leading AI economies.

76%

of businesses have adopted cloud technologies, up from **69%** last year, representing **10%** year-on-year growth. The Netherlands' cloud adoption rate of **76%** exceeds the European average of **68%**, reflecting the country's position as one of Europe's most digitally mature economies and a natural foundation for AI deployment.

65%

say AI adoption is a top or high priority (slightly higher than the **62%** European average), while **68%** say AI plays a critical or important role in their overall business strategy.

80%

of businesses who have adopted AI say that their timeline for innovation has accelerated in the past two years, compared to **93%** for startups. AI is the number one driver of these changes (**45%**), followed closely by rising competitive pressures in the marketplace (**43%**).

76%

report productivity gains from AI, and **81%** say that they expect AI to increase their growth in the next year.

30%

of AI-adopting businesses are harnessing the technology's most advanced use cases for transformation, up from **25%** last year. This outpaces the European average of **22%**.

23%

of businesses say they feel ready to adopt next-generation AI technologies such as agentic AI – contrasted by the **83%** of Dutch startups who report they are ready.

91%

of businesses say they have adequate choice to select and switch between different providers of AI technologies, and **83%** say this choice is important for their AI adoption.



A growing digital divide: Many businesses are not using advanced AI tools

Looking more closely at how AI is being implemented across Dutch businesses – from early experimentation through to full-scale transformation – a clear divide is emerging. While adoption is widespread, many organisations remain at the early stages of their AI journey, and progress toward more advanced, transformative use cases is uneven.

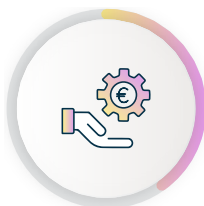
The majority of Dutch businesses (**55%**) are still at the most basic stage of AI adoption, although this has improved slightly from **59%** last year. These businesses are using publicly available chatbots for routine tasks or purchasing ready-made AI solutions – pre-built, off-the-shelf tools such as AI-powered customer service platforms, productivity assistants, or analytics software that can be deployed with minimal customisation – for incremental efficiency gains. This concentration is particularly pronounced in sectors such as public administration & defence (**70%**), healthcare (**65%**), and construction (**61%**), where adoption tends to be more cautious and incremental.

At the other end of the spectrum, a growing share of businesses are beginning to harness AI for more advanced and transformative purposes. **30%** of AI adopters are now combining multiple models, developing custom AI systems, or deploying agentic and autonomous tools – up from **25%** last year and well ahead of the European average. The progress is being driven by highly-digitalised sectors, such as:



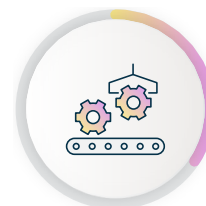
42%

Information & Communication



40%

Financial Services



33%

Manufacturing

While the Netherlands is outperforming the European average (**22%**) on advanced AI use, the pace of transition from basic adoption to full transformation remains gradual. A significant proportion of businesses are still not moving beyond pilot projects or isolated use cases, limiting the broader economic impact of AI.

Encouragingly, this shift toward more advanced adoption is translating into tangible innovation outcomes. **42%** of AI-adopting businesses report having launched a new AI-driven product or service in the past year, up from **36%** in 2025, signalling growing momentum beyond experimentation.

This gap risks becoming more pronounced as next-generation AI technologies emerge and innovation cycles accelerate. Businesses that successfully scale advanced AI will be better positioned to capture productivity gains, drive innovation, and compete globally – while those that remain at early stages risk falling behind. Closing this divide will require supporting businesses at every stage of the adoption journey. New adopters must be enabled to move beyond experimentation, while more advanced users must be empowered to scale. Ensuring that AI-driven transformation spreads across the full breadth of the economy, rather than remaining concentrated among leading firms, will be critical to sustaining the Netherlands' competitive edge.

Case study: myTomorrows is connecting patients to potentially life-saving treatments with AI



myTomorrows is a Dutch health tech scale-up that connects patients with relevant clinical trials and emerging treatments not yet approved for public use. Founded out of a personal experience navigating access to experimental therapies, the company aims to bridge the gap between millions of patients seeking options and thousands of treatments in development.

Using AI, the platform matches de-identified patient medical profiles with relevant clinical trials and expanded access programs. In one case, a mother and her son, both diagnosed with a rare genetic condition, were matched with 12 potential treatment pathways after previously having no options through standard care. "Going from zero options to 12 possibilities is hugely powerful," says CEO Michel van Harten.

Working with AWS, myTomorrows deploys its AI models within Europe to meet GDPR requirements, while leveraging cloud infrastructure to ensure reliability, scalability, and performance. The use of AI reduces matching time by up to **90%**, what once took hours can now be done in minutes, enabling faster, more informed decision-making for patients when time matters most.

Businesses say they aren't yet prepared for the next wave of AI

Next-generation AI technologies – such as agentic AI, physical AI, and advanced robotics – will play a defining role in the next phase of AI-driven innovation. These technologies move beyond traditional AI tools by enabling systems to plan, reason, and take actions autonomously across complex tasks. As these capabilities mature, they have the potential to reshape industries, accelerate innovation cycles, and unlock entirely new business models.

However, the data suggests that while awareness is beginning to grow, most organisations are still some distance from deploying these technologies in practice:

31%

Over three in ten businesses (**31%**) say they have heard of agentic AI, well above the European average of **24%**. This higher awareness likely reflects the Netherlands' deep base of large enterprise AI integration and its dense tech and startup ecosystem.

5%

Of those who are familiar with the technology, only 5% report that they have fully deployed agentic AI, while a further **15%** are experimenting or piloting the technology.

54%

When the technology was explained, a further **54%** say they have plans to use agentic AI or are considering it, while **14%** say they have no plans to adopt it.

The majority of businesses do not feel ready to adopt these emerging technologies, but startups emerge as a bright spot:



83% of startups say they feel fully or very ready to adopt next-generation AI technologies such as agentic AI – contrasted by 23% of businesses overall who report they are ready.



38% of all businesses say they are only somewhat ready, and 33% say they are slightly ready or not ready at all.

Those that have adopted agentic AI are realising benefits across their business. Among the most commonly reported are: faster decision-making and execution (**44%**), increased operational efficiency or productivity (**36%**), and improved scalability of operations (**25%**). Overall productivity increased for agentic AI adopters – **76%** of all AI adopters report seeing productivity gains thanks to AI, compared to **82%** of agentic AI adopters.

Businesses point to persistent constraints that prevent them from moving from shallow adoption to deeper transformation, and from readiness to real deployment of next-generation AI. **38%** cite skills shortages as a barrier to adopting next-generation AI technologies, **36%** cite insufficient internal financial resources, and **24%** cite legal uncertainty arising from AI and digital regulation.

Addressing these barriers represents a clear opportunity. As the next wave of AI accelerates, targeted action on skills, investment, and regulatory clarity can enable a much broader base of businesses to move beyond experimentation and capture the benefits of advanced AI. Without this progress, there is a risk that adoption remains uneven. With it, the Netherlands can instead narrow the gap, ensuring that the next generation of AI drives transformation across the economy, rather than concentrating gains among a small group of early adopters.

Case study: Paebbl is future-proofing the built environment with AI



Co-founded by Marta Sjögren and Andreas Saari, [Paebbl](#) is a Swedish–Dutch industrial resilience startup making the built environment more future-proof by permanently converting CO₂ into a carbon-negative building material. Concrete is the backbone of our cities - the most used man-made material on the planet - but cement production is one of the world's biggest carbon emitters, energy-intensive by nature, and increasingly exposed to price shocks and supply chain fragility. Paebbl is on a mission to flip that narrative, turning the problem into the solution, at an unprecedented pace.

Paebbl's core technology accelerates the natural process in which minerals absorb CO₂ - a reaction that would traditionally unfold over millions of years - down to under a couple of hours inside a chemical reactor. Each ton of Paebbl's first generation Supplementary Cementitious Material (Paebbl 200) permanently stores around 200kg of CO₂, locking it away in solid, stable rock and transforming concrete into a vast carbon store. Their Demo plant opened in March 2025, and with its first commercial plant targeted for 2028 and ambitions to scale to over a million tons of material annually shortly thereafter, Paebbl is moving fast, having already achieved a 2,500x scale-up in just three years.

AWS is central to that speed. Bringing a technology from laboratory to real-world factories demands intensive computation, simulation, and modelling. Paebbl runs this on AWS cloud infrastructure, combined with AI. AWS's systems support a range of critical functions, from building digital models of industrial equipment to conducting product lifecycle analysis that validates the material's carbon-negative credentials.

Paebbl has made significant use of AWS IoT to seamlessly connect data from its lab and pilot plants, making it rapidly available for analysis and feeding a continuous improvement loop across its engineering and product teams. Amazon Bedrock has allowed the firm to build a unified knowledge base from lab reports, analysis papers, engineering designs, and process data - with AI agents being developed on top of this to further accelerate decision-making and build a knowledge flywheel. By handling the analytical heavy lifting in the background, it frees Paebbl's team to focus on what matters: moving faster.

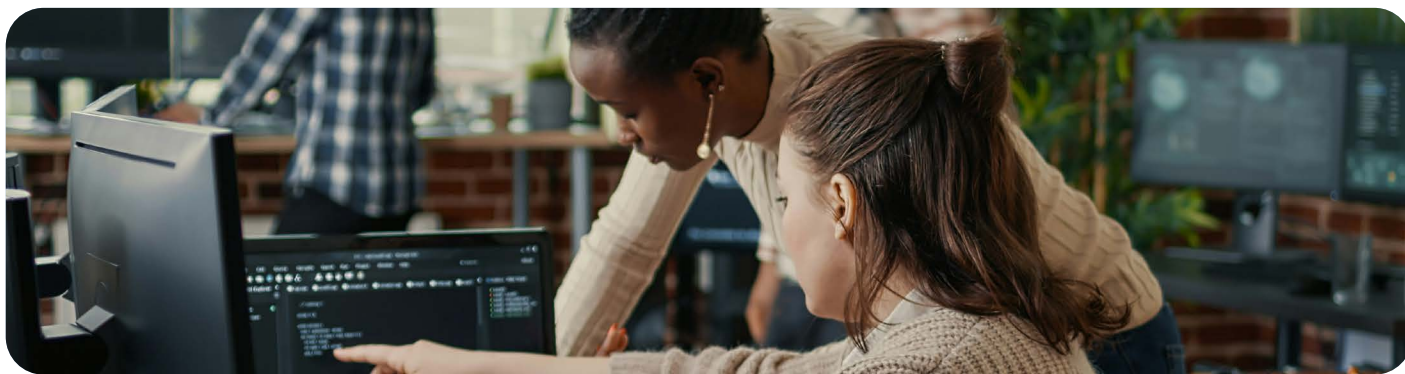
But AWS isn't just a technology partner. It was also the first to pilot Paebbl's carbon-storing material in the construction of a data centre in Spain, and joined a growing roster of leading companies pushing to make built infrastructure more resilient. That combination of cloud infrastructure and real-world product offtake makes AWS a uniquely aligned value chain partner in Paebbl's mission.

Businesses value choice and flexibility in the AI and cloud landscape

Businesses consistently emphasise the importance of access to global technology providers, particularly as they seek to innovate and scale beyond domestic markets. For most firms, sovereignty is understood in practical, operational and technical terms, defined by choice: not as ownership of every layer of the value chain, but as the ability to access best-in-class technologies, scale across borders and maintain choice and flexibility based on customer needs.

- **91%** of businesses say access to global technology companies is important for their AI adoption.
- **84%** say access is important for innovation, and **86%** for scaling quickly.
- **83%** say the ability to choose and switch between AI technology providers is extremely or very important.

This suggests that competitiveness, not ownership, is the primary lens through which businesses evaluate technology ecosystems.



Sovereignty should enable competitiveness, not constrain it

Debates around sovereignty and strategic autonomy are intensifying across the Netherlands and Europe. The critical question is not whether to pursue sovereignty, but how to ensure it is strengthening innovation and competition rather than limiting both.

When selecting tools and technologies, businesses consistently report that their priorities are speed, scalability, resilience, and security. In practice, this means organisations prioritise solutions that meet the needs of their customers and support rapid growth, rather than focusing primarily on the geographic origin of a technology provider.

As a result, rather than relying exclusively on domestic providers, companies typically combine services from multiple technology providers regardless of whether they are based in the Netherlands, in Europe, or elsewhere, selecting platforms and tools based on capability, performance, and compatibility with existing systems.

91%

of businesses say they have adequate choice to select and switch between different providers of AI technologies.

95%

report that they currently use a mix of providers from different regions, rather than working primarily with local providers. This is the highest rate across the markets surveyed.

90%

Cloud is also seen as critical: 90% of businesses say that access to global cloud computing providers is important for supporting growth in their business and industry.

For businesses that use technology from providers based outside their home country, the top reasons for this are a wider range of features or product offerings (**55%**), better scalability (**51%**) and more competitive pricing or favourable commercial terms (**48%**). This stresses the importance of maintaining access to global providers, especially those with deep local commitments.

When asked what sovereignty means to them, businesses say it means ensuring Europe has the capabilities, skills, and infrastructure needed to innovate independently in critical technologies (**46%**), strong data protection, privacy, and cybersecurity standards (**42%**), and control over how and where European data is stored and processed (**34%**). Citizens reflect similar perspectives, with a focus on data protection: Citizens say that digital sovereignty to them means strong data protection, privacy, and cybersecurity standards (**58%**) and control over how and where European data is stored and processed (**44%**). These findings suggest that sovereignty is primarily understood in terms of capability, security, and control, rather than exclusion. For both businesses and citizens, the priority is not to limit access to global technologies, but to ensure that Europe can innovate securely, maintain high standards of trust, and retain control over critical data and systems.

Data also suggests a limited appetite for sovereignty strategies from the government that increase cost without clear competitiveness outcomes. While public investment in European infrastructure can play an important role, particularly in building research, skills, and strategic capacity, businesses appear cautious about investments that would raise costs without delivering greater capability: Only **19%** say that greater public investment in Europe-based AI and cloud infrastructure should be a priority. Instead, businesses say they believe the highest priorities for public investment in Europe should be skills, education, and workforce training (**52%**), healthcare and life sciences (**44%**), and energy security and green transition (**41%**). This matches citizen viewpoints: Citizens say they believe the highest priorities for public investment in Europe should be healthcare and life sciences (**73%**), energy security and green transition (**56%**), and skills, education, and workforce training (**52%**).

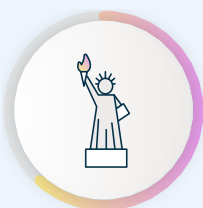
Keeping startups rooted in the Netherlands requires work

Dutch startups are at the forefront of AI adoption and integration, playing a critical role in driving innovation across the economy. As these companies grow and push the boundaries of advanced AI, they are increasingly entering a new phase.

This rapid progress highlights both the strength of the Netherlands' startup ecosystem and the growing importance of ensuring that high-potential companies can continue their growth journey domestically. As startups scale, they naturally encounter more complex challenges — from accessing larger markets to securing growth-stage funding and navigating cross-border expansion. Addressing these challenges effectively will be key to unlocking their full potential. As it stands, a substantial share of startups indicate openness to relocating to secure faster growth.



41% of Dutch startups say they would consider leaving Europe to scale their business — above the European average of 38%, and a reflection of the globally ambitious nature of the Dutch startup ecosystem and the acute scaling frustrations identified in last year's report, where 42% of businesses that viewed Europe as uncompetitive cited difficulty scaling across EU borders as a key reason.



Of those who said they would consider leaving Europe, the most commonly cited destinations are the United States **(61%)**.

The Dutch startup ecosystem generated \$96 billion in value between 2021-2023.¹ If even a portion of the **41%** of startups considering relocation were to scale abroad, a meaningful share of the next wave of economic value could be created outside Europe. This should be treated as an early warning signal. If even four in ten startups are considering relocation, the Netherlands should take this moment to retain and grow the next generation of global technology leaders.

When asked why they would consider leaving Europe, Dutch startups consistently point to their ability to grow and scale. The top reasons are:

- Greater availability of funding elsewhere **(58%)**
- Lower operational costs **(55%)**
- Faster ability to scale internationally **(52%)**
- Better access to global markets **(48%)**

These findings reinforce a central theme of this year's report: in an accelerated innovation cycle, the global race is increasingly shaped by speed – and founders will follow the pathways that reduce friction and shorten time-to-market.

Founder flight is not inevitable. Startups are clear about what would make Europe a more attractive environment for scaling. Among startups that say they would consider relocating, the following factors would encourage them to stay:

- Greater availability of funding — both VC and growth funding, and increased public funding **(70%)**
- A clearer, more proportionate and stable regulatory environment that supports innovation **(66%)**
- Faster ability to scale both within and outside Europe **(30%)**

The opportunity is clear: to build on the Netherlands' success as a hub for startup creation and ensure it is equally strong as a destination for scaling. By creating an environment where scaling is as seamless as starting, the Netherlands can position itself not just as a launchpad for innovation, but as a long-term home for globally competitive technology leaders.



Tackling barriers to deeper AI adoption

While the Netherlands is moving fast, several barriers and structural challenges must be addressed to ensure that momentum translates into broad-based, sustainable growth.

1. Increasing regulatory compliance costs

Businesses report that even where adoption is advancing, scaling AI internationally introduces legal complexity, higher compliance costs, and operational friction, particularly for firms operating across multiple markets and regulatory environments.

Europe's simplification efforts are not working. Businesses say that this scaling friction is compounded by the broader compliance burden businesses already face as they navigate regulatory fragmentation: Rising compliance costs, now accounting for **40%** of total tech spend, up from **35%** last year, demonstrate that Europe's simplification efforts have not yet fully translated into reduced compliance burden for businesses. This growing cost burden directly constrains businesses' ability to invest in innovation, limiting their capacity to scale AI and compete globally. In practice, this means that resources which could be directed toward building new products, improving productivity, and strengthening competitiveness are instead absorbed by navigating regulatory complexity.

When asked what makes up this **40%**, **49%** of businesses cite relationship management (e.g. keeping clear documentation, communicating with regulators, filling out forms and filing queries) with the responsible government authorities, followed by legal consultations or external advisory services (**43%**), and employee training on compliance requirements (**37%**). These figures are broadly consistent with the European averages.

79% say compliance costs have increased over the past three years, and **78%** expect these costs to rise further over the next three. Across Europe, **81%** report rising costs and **80%** expect further increases.

2. Access to a skilled workforce and finance pathways

Skills shortages remain the most commonly cited constraint on adoption and expansion, alongside limitations in internal capacity:

- **58%** cite shortages of AI and digital skills as a barrier to adopting or expanding AI, significantly higher than the European average of **51%**
- **47%** cite insufficient internal workforce capacity
- The skills businesses most commonly identified as lacking in their workforce are AI and machine learning expertise (**50%**), cybersecurity (**45%**) and data analytics and engineering (**45%**)

These challenges are reflected in businesses' self-assessment of capability. Only a minority report having a strong AI skillset today, while most say their skills need improvement:

- Only **25%** say they currently have a strong AI skillset.
- **50%** say they have some AI skills but need improvement, and **21%** say they are only just beginning to develop AI skills.
- **87%** expect AI skills to be important in their industry over the next five years.
- The technical roles that businesses feel will be more important in the next five years are: AI and machine learning engineers (**64%**) and cybersecurity specialists (**60%**)

Access to finance remains the second structural constraint. Many businesses report that they lack dedicated AI budgets, and those that do often allocate only a small share of IT spend toward AI – limiting their ability to move beyond pilots and narrow use cases:



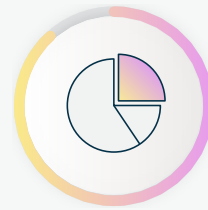
32% cite insufficient internal financial resources as a barrier to adopting or expanding AI.



24% cite unclear ROI or an unclear business case as a barrier.



41% say they do not have a dedicated AI budget.



90% expect AI to take a larger share of IT spend over the next three years, predicting it to rise to **20%** of their total IT budget.

Together, these findings suggest that while businesses recognise the strategic importance of AI capabilities, many organisations remain at an early stage of building the internal expertise required to deploy AI at scale.

3. Innovation without incentives

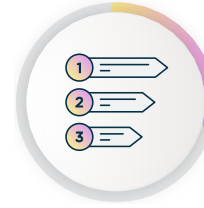
Businesses report that limited external support, weak demand signals, and complex procurement processes make it harder to justify the risk and investment required to scale AI across operations or develop new AI-driven products.



58% say government support, such as grants and tax incentives, is crucial or very important in their decision to adopt AI.



21% say a lack of incentives or external support discourages investment in AI.



29% say other business priorities take precedence over AI investment.

Public sector demand can help accelerate diffusion, but procurement remains a consistent barrier:

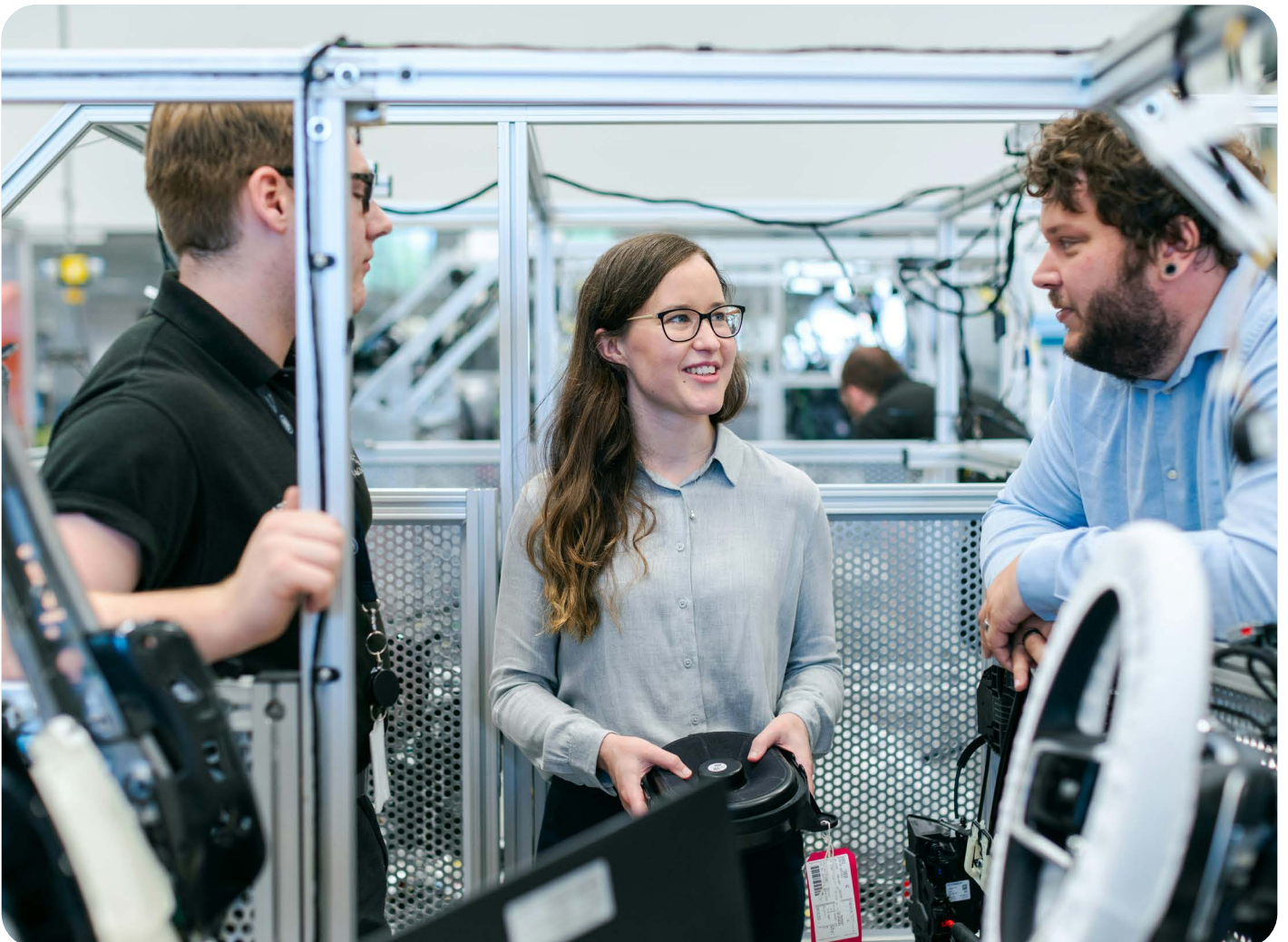
36%

cite complex or slow public procurement processes as a challenge to scaling AI solutions.

31%

say opportunities to sell to the government are crucial or very important in their decision to adopt AI.

If these barriers persist, the region risks missing its window of competitiveness just as global AI capabilities accelerate.





Recommendations: Unlocking the Netherlands's AI future

1. Maintain access to global technology providers

The Netherlands already has many of the foundations required to compete in an accelerated AI era.

When asked what matters most for supporting growth in their business and industry, Dutch businesses point to: access to skilled talent (**57%**), regulatory clarity and simplification (**50%**), and access to global technology providers and infrastructure (**47%**). These priorities highlight that competitiveness is driven not by isolation, but by the ability to combine talent, clear rules, and access to the best available technologies.

There is also confidence in Europe's broader position. **76%** of businesses agree that Europe has the infrastructure and ecosystem needed to scale globally, while **59%** rate Europe as highly or somewhat competitive as a global hub for AI and innovation. This provides a strong foundation to build on.

However, businesses are clear that access to the best tools remains critical. When **84%** say access to global technology companies is important for their innovation, and **91%** for their AI adoption, the direction of travel is clear. Policymakers must safeguard access to global technology providers and preserve competitive, open ecosystems. In practice, this means ensuring that businesses can continue to adopt, integrate, and scale using best-in-class tools from across global markets.

Dutch businesses consistently emphasise that access to leading AI and cloud technologies is not just a preference, but a prerequisite for adoption, innovation, and scaling. Sovereignty strategies should therefore be designed to strengthen resilience and capability, while maintaining interoperability, flexibility, and cross-border collaboration. Approaches that limit choice or increase fragmentation risk slowing adoption and raising costs, particularly for smaller firms.

At the same time, trust and security must be treated as core enablers of AI adoption. Leading technology providers enable businesses to innovate with AI while maintaining high standards of data privacy, security, and control. This reflects a model of sovereignty grounded in capability: businesses are able to safeguard sensitive data and meet regulatory requirements, while still accessing cutting-edge global technologies. Strengthening this balance between openness and control will be critical to building trust and accelerating adoption across the economy.

The challenge now is to scale what works, including ensuring that access to world-leading technologies enables innovation to spread beyond a handful of firms and into the wider economy.

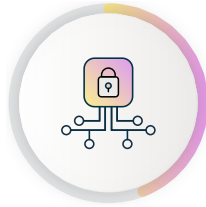
2. The simplification agenda must become a priority

Rising compliance costs - now absorbing **40%** of tech spend - underscore the urgency of Europe's simplification agenda.

When businesses face regulatory complexities, they report the biggest regulatory issues are:



Data protection and privacy rules (**51%**)



Cybersecurity and critical-infrastructure requirements (**44%**)



AI-specific rules and compliance (**41%**)

In addition to this, only **31%** of businesses say they have a clear understanding of the EU AI Act – demonstrating that regulatory clarity and cross-border consistency are essential to ensure capital is directed toward innovation and scaling, rather than administrative burden. Simplifying regulatory frameworks and reducing fragmentation across the Single Market would strengthen competitiveness and free up resources for AI deployment.

This will direct funding and support where it is most needed, while ensuring that this wave of transformation includes citizens and the public sector.

3. Strengthen skills and scale the Single Market for AI

Dutch businesses consistently report that they are held back from increasing AI adoption by a lack of digital skills. Governments and businesses must work together to close this gap and equip citizens — both those already in work and the workforce of the future — with the capabilities needed to succeed in an AI-enabled economy. For a country that has long positioned itself as a leading knowledge economy, this transition represents the next natural step in its economic evolution.

This includes accelerating support for businesses transitioning from basic to more advanced AI use cases, with a particular focus on enabling the deployment of next-generation tools such as agentic AI. Targeted investment in skills development, clearer and more predictable regulatory frameworks, and practical guidance on implementation will be critical to helping businesses move from experimentation to real-world deployment.

A competitive Europe must remain open to innovation, investment and global collaboration. A sustainable Single Market that provides scale, predictability and openness will be critical to attracting investment, retaining startups and ensuring that AI-driven transformation benefits businesses of all sizes across the economy.

The Netherlands has a clear opportunity to lead — and the time to act is now

The Netherlands has built a strong foundation for AI, with high levels of adoption, a digitally mature economy, and a vibrant startup ecosystem. But as AI enters a new phase defined by more powerful and autonomous systems, the pace of change is accelerating. The challenge is no longer whether businesses adopt AI, but whether they can move quickly enough from early use to meaningful, scaled impact. Without faster progress on readiness, from skills and investment to regulatory clarity, there is a risk that the benefits of AI remain concentrated among a small group of leading firms.

The opportunity is still within reach. By strengthening the conditions for scaling through supporting businesses to deepen their use of AI, maintaining access to global technologies, and ensuring that innovation can spread across the wider economy, the Netherlands can convert its early lead into sustained competitive advantage. Acting now will be critical to ensuring that AI drives broad-based productivity, innovation, and growth, rather than widening gaps across sectors and firms.

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

This study was designed with the objective of delving deep into the digital landscape:

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. [Global Startup Ecosystem Report](#)