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State of AI in The Netherlands

Igniting Europe's Hidden AI Powerhouse

July 2025

Introduction

AI poses a generational opportunity for wealth creation

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

AI is **rewiring the economy**: value will shift from labor to models

The disruptive effects are already felt in software companies. Others will follow shortly

Future wealth creation depends on being an 'AI shaper' or 'AI taker'

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

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

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

Key questions to resolve

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

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

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

Executive Summary

One of the deepest AI talent pools in Europe

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

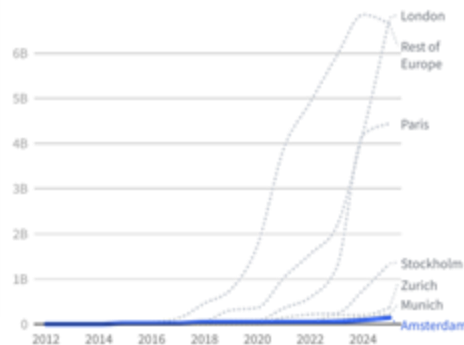
Number of AI Talents in NL versus peers

Country	AI Talents	AI Talents share	Number of AI Talents per 10k Capita	pop
Luxembourg	768	0%	131	1
Netherlands	18.7K	8%	117	117
Ireland	4.5K	2%	15	15
Switzerland	7.6K	3%	18	18
Denmark	4.5K	2%	16	16
Cyprus	609	0%	12	12
United Kingdom	40.9K	18%	10	10
Sweden	5.8K	3%	13	13
France	36.4K	16%	12	12
Finland	3K	1%	16	16
Malta	242	0%	9	9
Norway	2.6K	1%	15	15
Portugal	4.8K	2%	10	10
Germany	35.6K	16%	11	11
Spain	20.3K	9%	14	14

A talent magnet without propulsion

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

Amsterdam enterprise value compared to other major European hubs



Need for capital and a scientific impulse

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

Ranking of Amsterdam on key performance indicators

	Early VC	Breakout VC	Late stage VC	EV 2024	Total number of unicorns	Number of alumni founders	Total number patents developed
Paris	\$1.1B	\$1.1B	\$5.4B	\$5.4B	11	19	468
London	\$1.8B	\$1.8B	\$5.2B	\$5.2B	18	135	2K
Cambridge, UK	\$239.5M	\$451.3M	\$1.4B	\$146.9B	3	495	4.1K
Munich	\$1.1B	\$1.1B	\$3B	\$28.6B	4	370	13.7K
Stockholm	\$119.1M	\$476.9M	\$620M	\$27.6B	4	148	318
Copenhagen	\$119.1M	\$342.3M	\$710M	\$19.3B	3	171	1.4K
Amsterdam	\$119.1M	\$590.7M	\$519M	\$17.2B	3	216	28
Zurich	\$343M	\$119.1M	\$650M	\$10.2B	3	296	429
Oxford	\$165M	\$329.3M	\$1.3B	\$5.4B	2	396	266
Berlin	\$119.1M	\$1.2B	\$100M	\$12.3B	1	213	196



Investing in the AI-enabled Future of Commerce.

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

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

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

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



Positioning the Netherlands as a leading global Tech hub

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

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

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



dealroom.co

Global startup & venture capital intelligence platform

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

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



“The Netherlands has the foundations to become an ‘AI maker, not an AI taker.’

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

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

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

Fabricio Bloisi, CEO

—

prosus



“The Dutch AI ecosystem is brimming with potential, but that’s not enough to win.”

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

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

Constantijn van Oranje, Special Envoy

techleap.nl

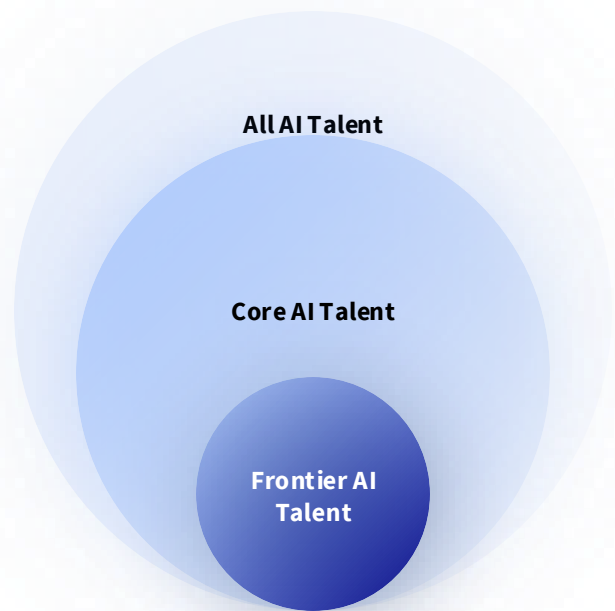
1. Dutch surprise: One of the deepest talent pools in Europe

2. A society that lags in AI trust and adoption

3. AI startup scene without escape velocity

4. A call for action

The Netherlands has a deep AI Talent pool



	# in Europe ('000)	# in NL ('000)	Definition
All AI Talent	229	19	Includes all AI professionals whether they are utilizing existing AI tools / platforms / models developed by others, or building the core AI tech. (e.g., from Data Scientists applying pre-built models for analysis to ML Engineers building core models).
Core AI Talent	65	4	Primary role involves developing, researching, or engineering novel AI models, algorithms, or systems (e.g., ML Engineers building core models, AI Researchers, Robotics Engineers focused on AI components, Model Validators, Feature Engineering specialists).
Frontier AI Talent	10	1	Core AI Talents that have an AI related PhD and are current AI researchers

An unexpected surprise:

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

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

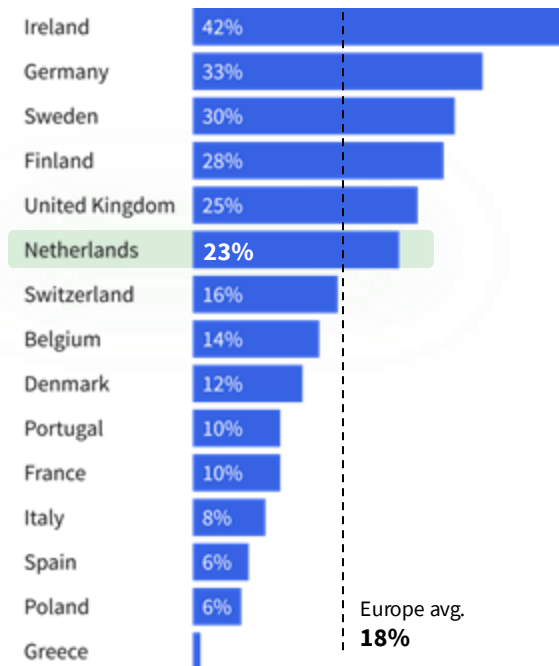
Country	AI Talents	AI Talents share	Number of AI Talents per 10k Capita
Netherlands	18.7K	8%	10.9
Ireland	4.5K	2%	9.4
Switzerland	7.6K	3%	9.0
Denmark	4.5K	2%	7.7
United Kingdom	40.9K	18%	6.2
Sweden	5.8K	3%	5.7
France	36.4K	16%	5.4
Finland	3K	1%	5.4
Portugal	4.8K	2%	4.7
Germany	35.6K	16%	4.3
Spain	20.3K	9%	4.3
Europe	229.5K	100%	3.8
Belgium	4.1K	2%	3.6
Austria	2.7K	1%	3.1
Poland	8.8K	4%	2.3
Italy	12K	5%	2.0

Additional 17 rows not shown

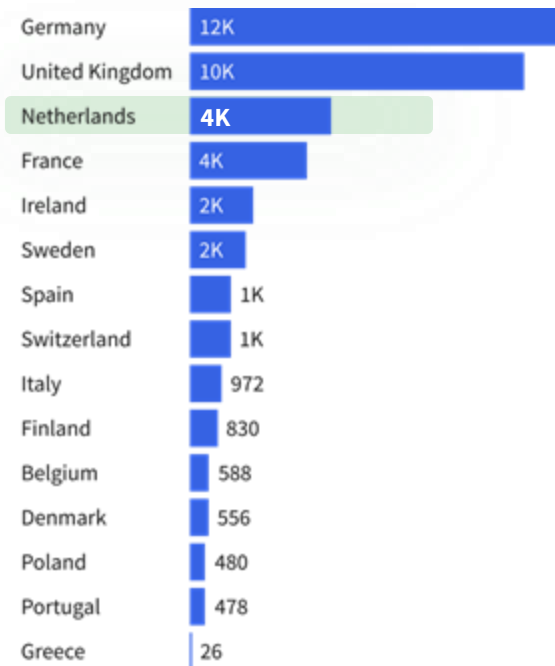
Netherlands is one of Europe's main magnets for global AI talent

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

Share of extra-European AI Talents per country



Number of extra-European AI Talents per country

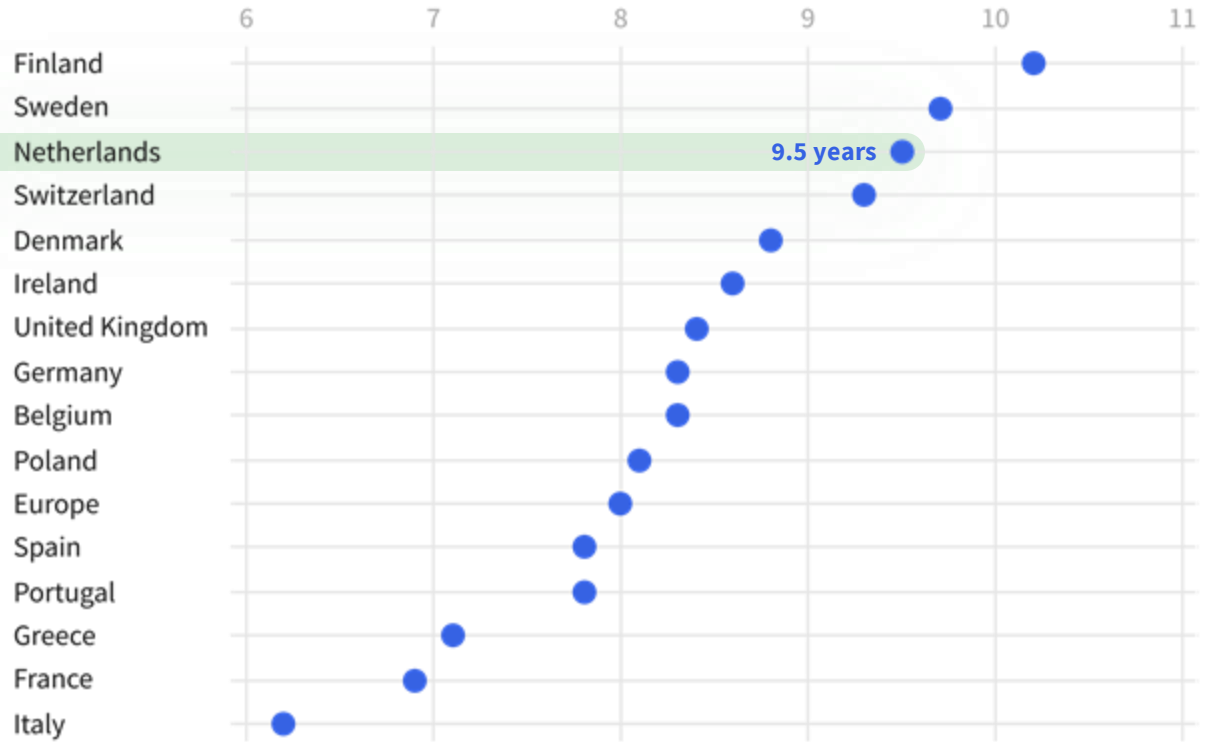


Source: Dealroom.co;

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

Netherlands is also one of the most experienced AI talent hubs

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



Source: Dealroom.co;

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

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

	City	AI Talents	AI Talents share in country
1 st	Amsterdam	6951	37.2%
	Utrecht	1988	10.7%
	Eindhoven	1180	6.3%
	Rotterdam	1017	5.4%
	The Hague	825	4.4%
	Delft	570	3.1%
	Groningen	404	2.2%
	Nijmegen	313	1.7%
	Leiden	277	1.5%
	Arnhem	230	1.2%
	Tilburg	219	1.2%
	The Randstad	211	1.1%
	Enschede	206	1.1%
	Maastricht	202	1.1%
	Den Haag	182	1.0%



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

	City	AI Talents	AI Talents share global
	London	20K	8.7%
	Paris	15K	6.6%
	Berlin	8K	3.4%
	Madrid	8K	3.3%
5th	Amsterdam	7K	3.0%
	Munich	5K	2.3%
	Barcelona	5K	2.1%
	Warsaw	4K	1.7%
	Dublin	3K	1.4%
	Stockholm	3K	1.3%
	Zurich	3K	1.3%
	Copenhagen	3K	1.3%
	Milan	3K	1.2%
	Lisbon	2K	1.0%
	Utrecht	2K	0.9%



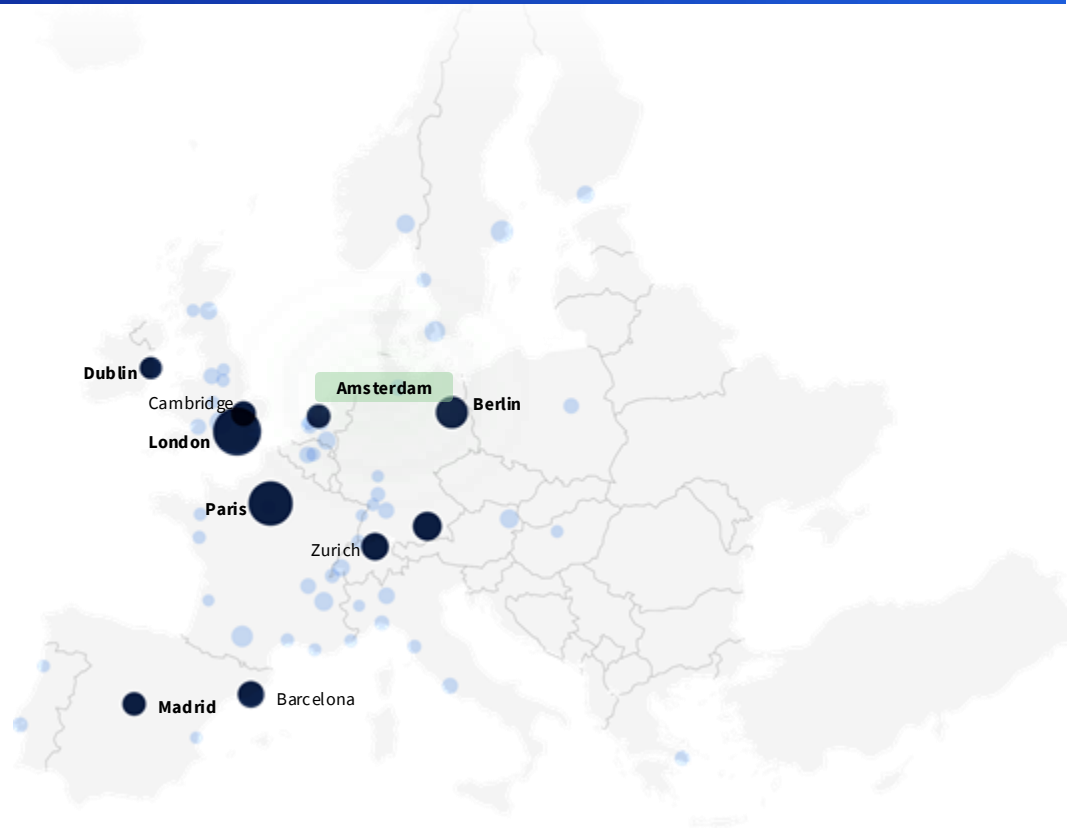
TNO, Eindhoven university, and TU Delft are home to the largest pools of AI research talent

	Name	Frontier AI Talents
1st	TNO	49
	Eindhoven University of Technology	41
	TU Delft	38
	University of Twente	18
	Philips	18
	Utrecht University	17
	University of Groningen	16
	ASML	16
	University of Amsterdam	16
	Maastricht University	14
	VU Amsterdam	14
	WUR	13
	VUmc	12
	Leiden University	11
	Radboud University	11



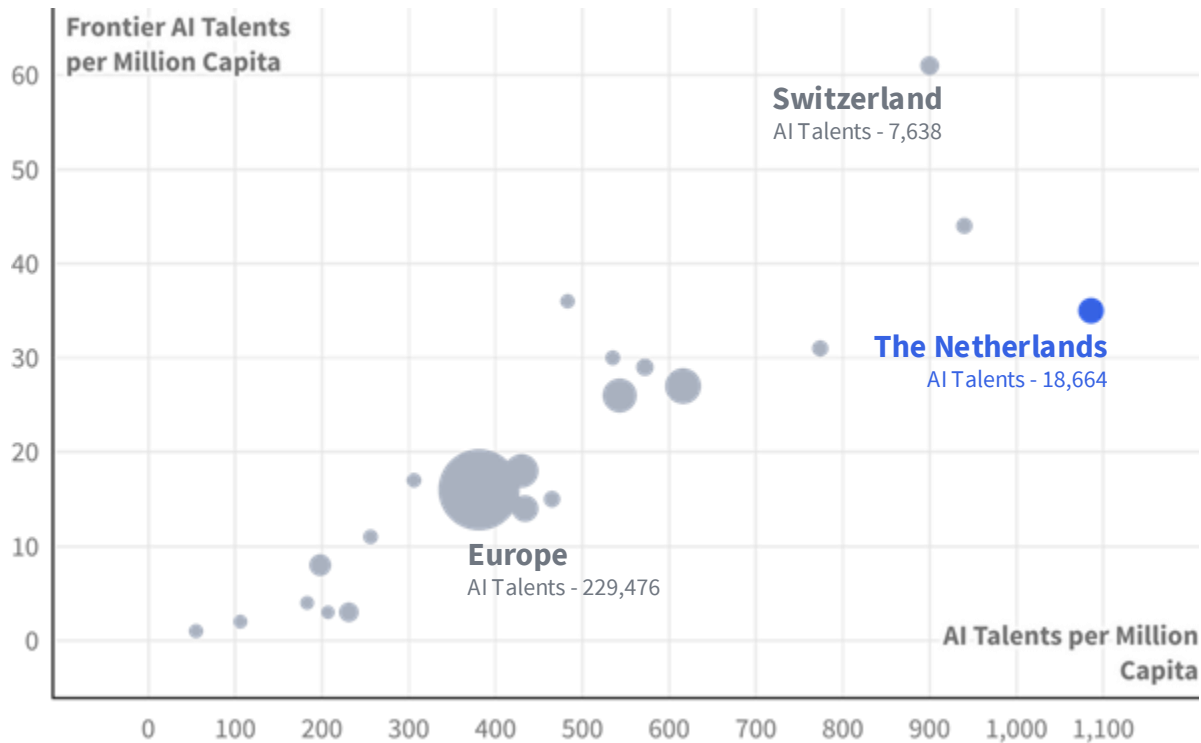
A top hub of Frontier AI researchers ranking #8 in Europe

City	Frontier AI Talents share
London	7.1%
Paris	6.0%
Berlin	3.0%
Munich	2.4%
Zurich	2.2%
Barcelona	2.0%
Cambridge	1.8%
8 th Amsterdam	1.6%
Madrid	1.5%
Dublin	1.4%
Stockholm	1.3%
Oxford	1.3%
Toulouse	1.3%
Copenhagen	1.2%
Vienna	0.9%



Why does this matter? Top AI talent attracts other talent

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



Europe's feeder club for Silicon Valley

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

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



ANTHROPIC

Durk Kingma



MIT
Massachusetts
Institute of
Technology

Michiel Bakker



groq

Rick Lamers



Meta

Taco Cohen



Meta

Tijmen Blankevoort



Google

Tim Salimans



contextual.ai

Douwe Kiela

Strong universities, no global flagship

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

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

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

Source: Dealroom.co;

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

Top Frontier AI universities & public research centers in Europe

Name		Frontier AI Talents
University College London		94
Imperial College London		88
French National Centre for Scientific Research		76
University of Oxford		65
University of Cambridge		60
ETH Zurich		56
7 TNO		49
INRIA		49
King's College London		44
10 Eindhoven University of Technology		43
11 TU Delft		40
The University of Manchester		40
European Commission		40
CEA		34
German Aerospace Center		34

Top frontier AI private companies and labs in Europe

Name		Frontier AI Talents
Google		66
Meta		50
Amazon		42
Huawei		38
Apple		36
Microsoft		36
AstraZeneca		36
8 Philips		32
Ericsson		32
IBM		24
Orange		24
Thales Group		23
Helmholtz Munich		20
Siemens		20
Nokia Bell Labs		20

70% of Dutch practitioners sit in old-economy or government roles



70%

Old Economy
and government

32%

Tech native
companies

7%

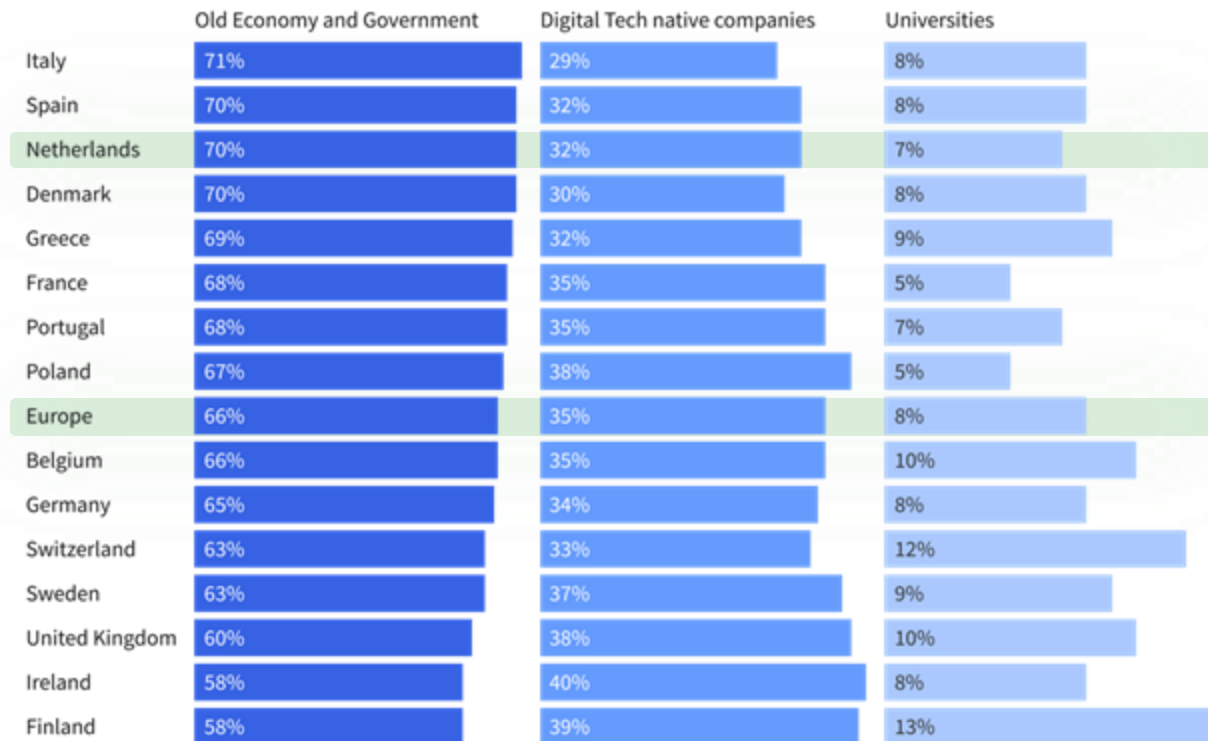
Universities

The packed, but parked workforce

About 70% of Dutch practitioners sit in old-economy or government roles.

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

Where do AI talents work?



Source: Dealroom.co;

Showing the top 15 AI Talent country hubs by number of AI Talents.

The data can add up to more than 100% because people can have multiple current positions.

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

2. A society that lags in AI trust and adoption

3. AI startup scene without escape velocity

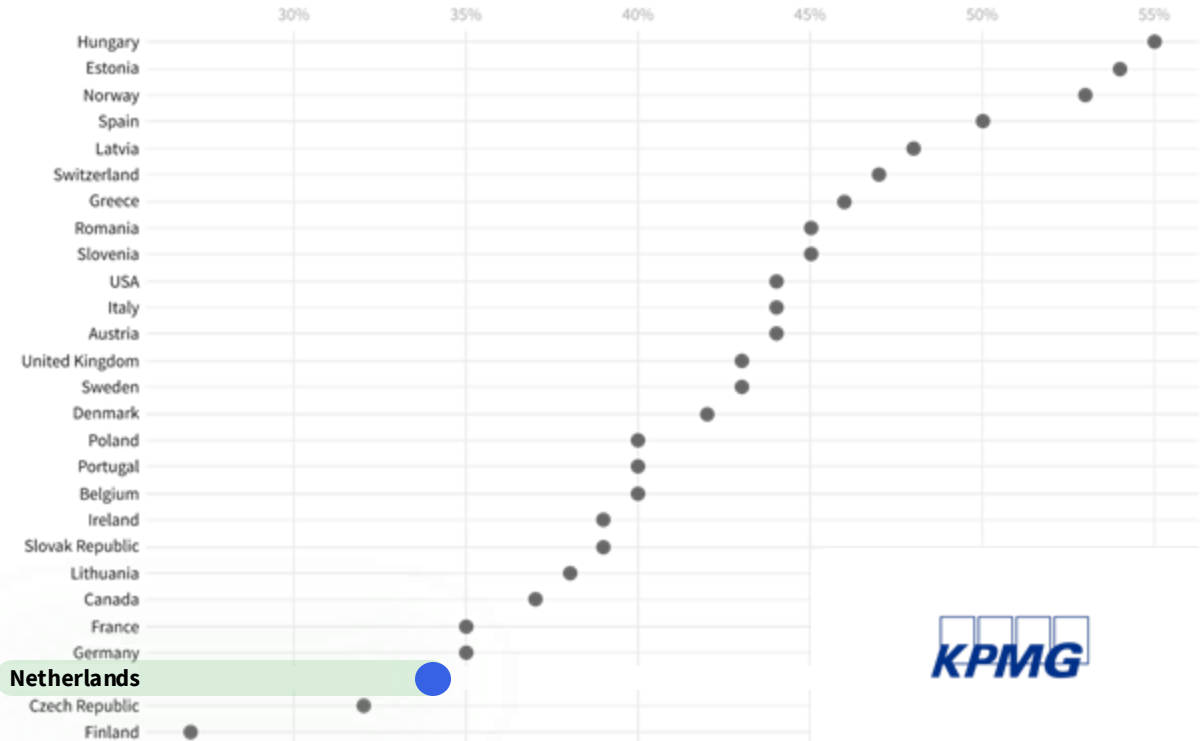
4. A call for action

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

Source:

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

Share of respondents with Trust in AI Applications*

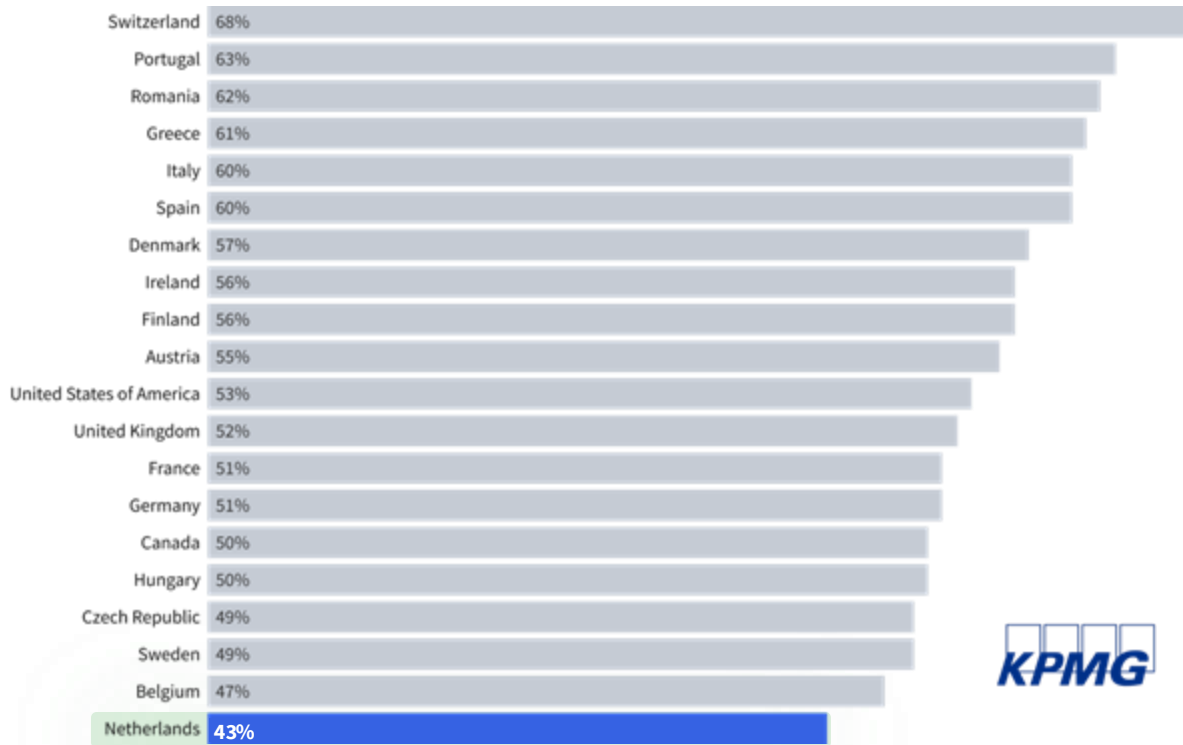


Distrust and lack of awareness results in long sales cycles and limited adoption

Source:

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

Share of respondents using AI on a semi-regular basis*



Co-Authors of the AI-Plan



Jelle Prins

Co-Founder



Michiel Bakker

Assistant Professor



“

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

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

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

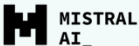
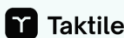
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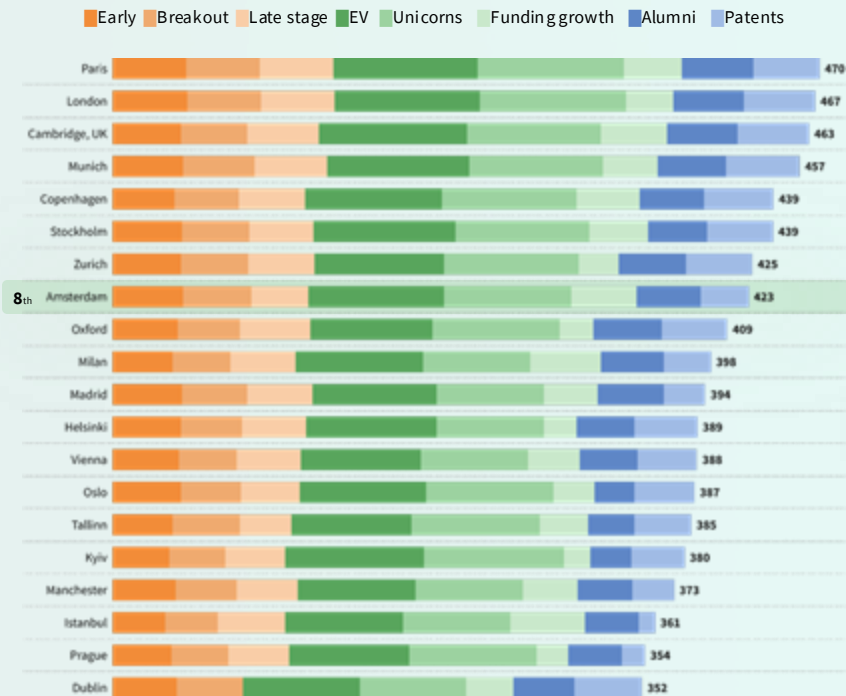
4. A call for action

The Netherlands has many AI startups

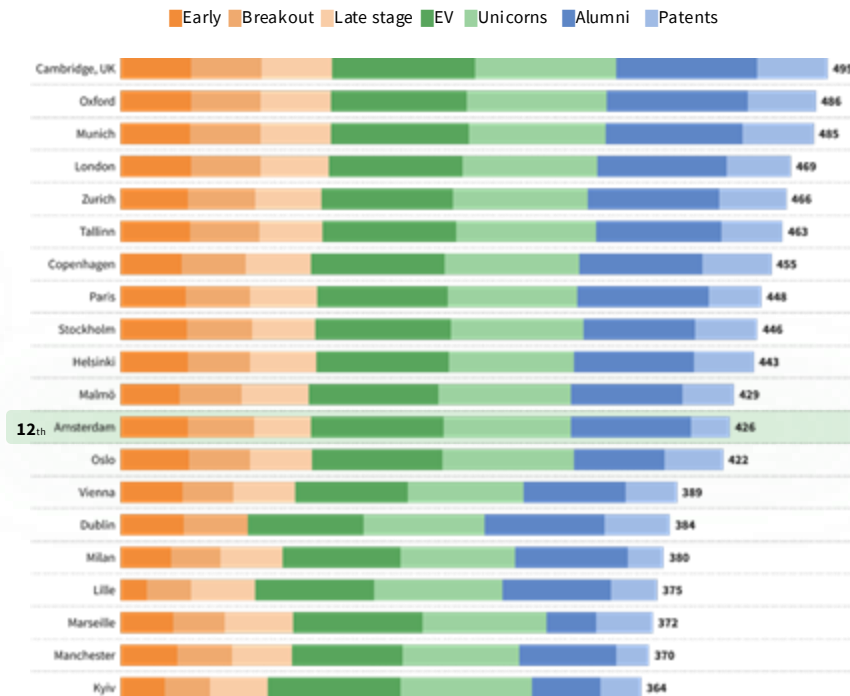
	GB UK	FR France	CH Switzerland	DE Germany	NL Netherlands	EU Europe
N° of AI Startups	2,040	842	360	1,296	618	8,599
Total n° of Startups	23,688	11,462	3,719	13,657	6,653	94,850
AI as % of total startups	8.6%	7.3%	9.7%	9.5%	9.3%	9.1%
AI Startups/million people	29	13	39	15	36	12
Examples of AI companies	  	  	 	 	  	

Amsterdam AI startup ecosystem is the #8 in Europe

Ecosystem Index 2025 Top AI Champions Europe

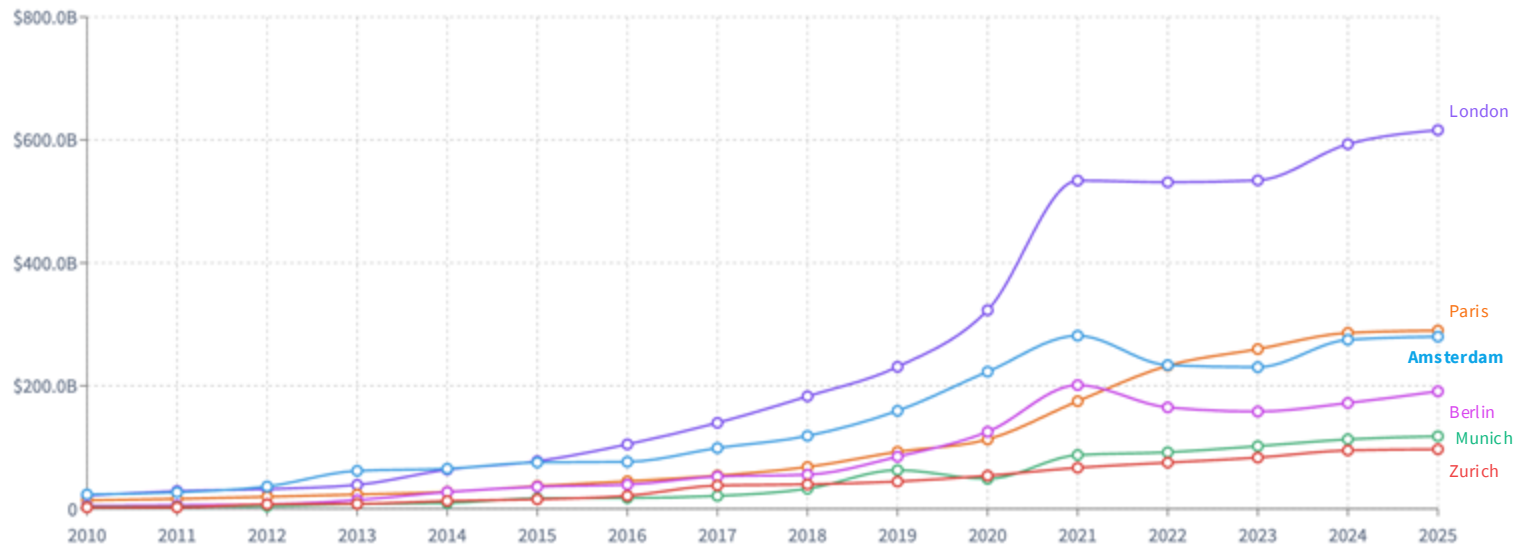


Ecosystem Index 2025 Top Density Leader AI Europe



Within Europe, broader Amsterdam tech ecosystem is losing momentum

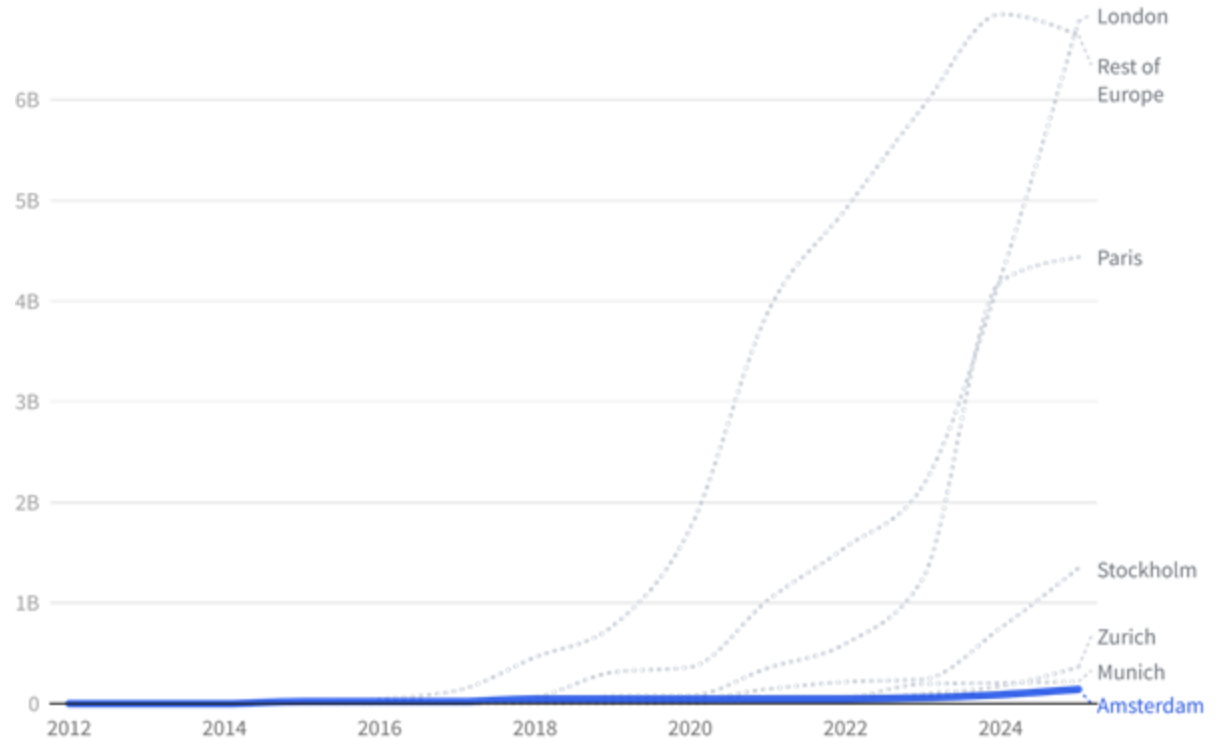
Total Enterprise value of Tech Sector in key European cities, 2010-2025



A talent magnet without startup momentum

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

Evolution of Agentic AI total Enterprise Value by major European cities



The Netherlands is trailing on growth capital and scientific impuls

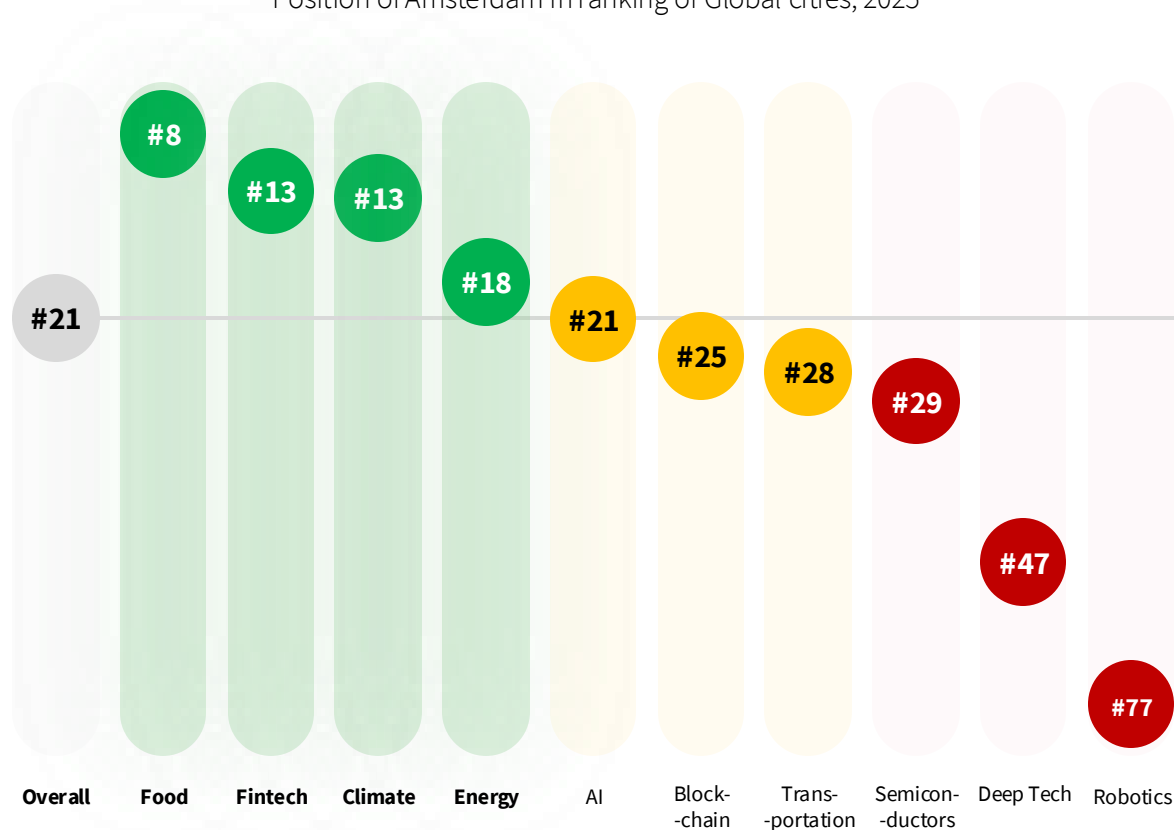
Global Tech Ecosystem Index 2025: Global Champions in AI in Europe

		Startup Capital 21-24 <\$15M rounds	Breakout Capital 21-24 <\$15-100M rounds	Scaleup Capital 21-24 >\$100M rounds	Combined Enterprise Value As of 2024	Unicorns and \$1B+ exits Count	Alumni Founders Number of alumni founders that raised more than \$1M	Patents Total number of active/pending patents
#1	Paris	\$1.3B	\$2.5B	\$5.4B	\$59.1B	11	2K	468
#2	London	\$2.5B	\$5.8B	\$5.2B	\$83B	18	1.1K	2K
#3	Cambridge, UK	\$239.5M	\$451.3M	\$1.4B	\$146.9B	3	495	4.1K
#4	Munich	\$1.2B	\$1.1B	\$3B	\$28.6B	4	370	11.7K
#5	Stockholm	\$266.5M	\$476.9M	\$620M	\$27.6B	4	148	318
#6	Copenhagen	\$119.1M	\$342.3M	\$710M	\$19.1B	3	171	1.4K
#7	Amsterdam	\$391.1M #6	\$590.7M #7	\$515M #18	\$17.2B #9	3 #7	216 #11	28 #43
#8	Zurich	\$343M	\$689.8M	\$650M	\$10.2B	3	296	429
#9	Oxford	\$165M	\$329.3M	\$1.1B	\$5.4B	2	396	266
#10	Berlin	\$764.4M	\$1.2B	\$100M	\$12.3B	1	213	196

Vertical bets over horizontal hype?

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

Position of Amsterdam in ranking of Global cities, 2025



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The Netherlands has a great foundation to build on

Home of the European Tech Giants

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

Education powerhouse

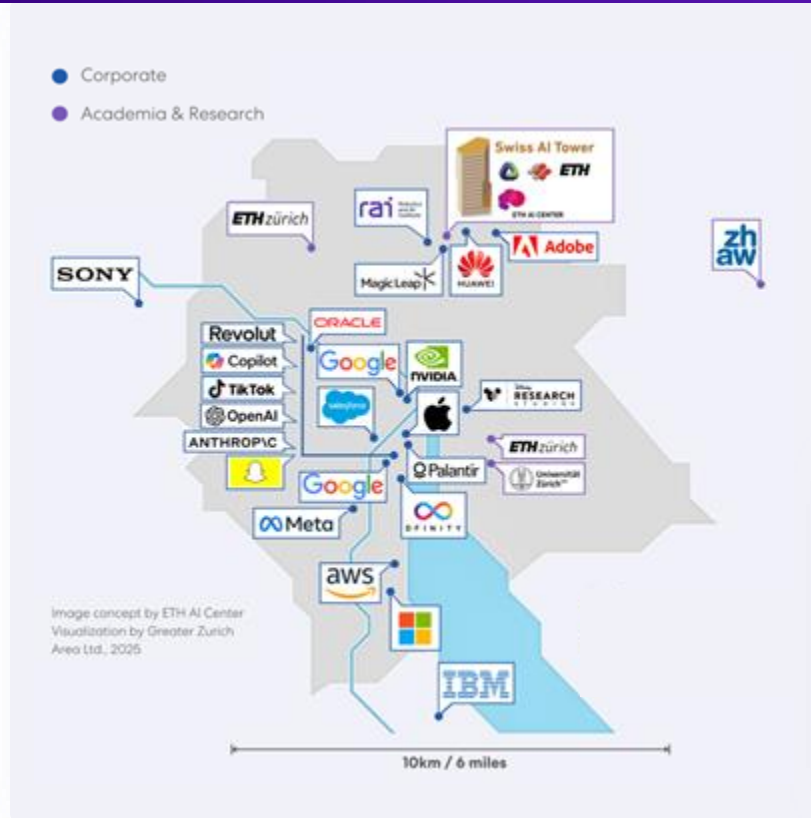
- Universities and institutions breeding Europe's Frontier AI talent

Global Talent destination

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



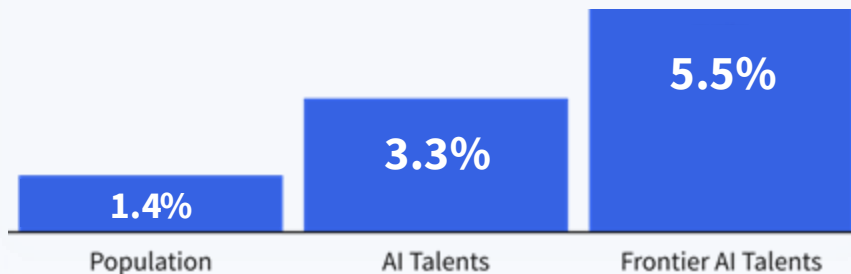
Learning from the best: How Zurich became a major AI powerhub



Key Success Factors

- World-class academic institution (ETH)
- Presence of big Tech (major Google office)
- 'AI sandbox'
- High quality of life
- High wages / low taxes
- International, English speaking tech scene
- Political stability, tech neutral

Switzerland as % of Europe



How does Amsterdam compare with other major European AI hubs?

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

Proposed action plan

1

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

2

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

3

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

4

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

5

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

6

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

7

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

8

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



prosus

Our commitments to the Dutch AI ecosystem

1

We will build out a
Global AI Experience in
Amsterdam

2

We will grow Prosus AI
team **5x in the next 2
years**

3

We **seek to invest** in the
local AI startup
ecosystem

4

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

Authors of this report



Sebastiaan Vaessen

Board at Dealroom.co
Strategy Advisor at Prosus



Yoram Wijngaarde

Founder and CEO
at Dealroom.co



Jelle Prins

Co-Founder
at Cradle



Lorenzo Chiavarini

Head of Research
at Dealroom.co



Julien Puls

Data Scientist
at Dealroom.co



Tamara Franssen

Project Manager AI & Deeptech
Capital at Techleap

Appendix

Other Major European AI Hubs:

Merantix Berlin

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



STATION F

Other Major European AI Hubs:

Station F in Paris

- Station F, launched in 2017 by entrepreneur Xavier Niel, is the world's largest startup campus, located in Paris.
- Spanning 34,000m² and hosting over 1,000 startups at a time, it serves as a hub for innovation across tech sectors, with artificial intelligence playing a central role.
- The campus features more than 30 startup programs and deep integration with corporate partners like Microsoft, Amazon, Meta, Apple, and Google.
- AI has become increasingly prominent at Station F with 34 of the 40 companies in its 2024 "Future 40" cohort being AI-driven.
- Several key AI initiatives are anchored at Station F. Meta, Hugging Face, and Scaleway run a joint European AI Startup Program, offering selected scale-ups access to compute resources, mentorship, and technical infrastructure.



Other Major European AI Hubs:

London AI Hub in London

- The London AI Hub, opened in February 2025 in Farringdon, is a new initiative from Tech Nation in partnership with Merantix, Husayn Kassai (founder of Onfido and Quench.ai).
- Located at a flagship site on Goswell Road, the 6,000 ft² hub is modeled after global AI spaces like Station F in Paris and the Merantix AI Campus in Berlin.
- The hub is designed to support the UK's growing AI ecosystem, which includes over 1,300 AI-focused companies and a workforce of around 360,000.
- It provides high-quality co-working space, a curated program of events, and serves as a focal point for collaboration across startups, corporates, academia, and government.
- The mission is to foster responsible AI development and bring together stakeholders from across sectors to drive innovation and growth.



Other Major European AI Hubs:

AI Sweden in Stockholm

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



Other Major European AI Hubs:

ETH Zurich

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





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