



European  
Commission

MEANINGFUL  
ENDEAVOURS

 Breda  
University  
OF APPLIED SCIENCES

# Erasmus+

Gathering

**Dr. Jorrit Snijder**

President Breda University of Applied Sciences  
[Snijder.J@buas.nl](mailto:Snijder.J@buas.nl)

December 4, 2025

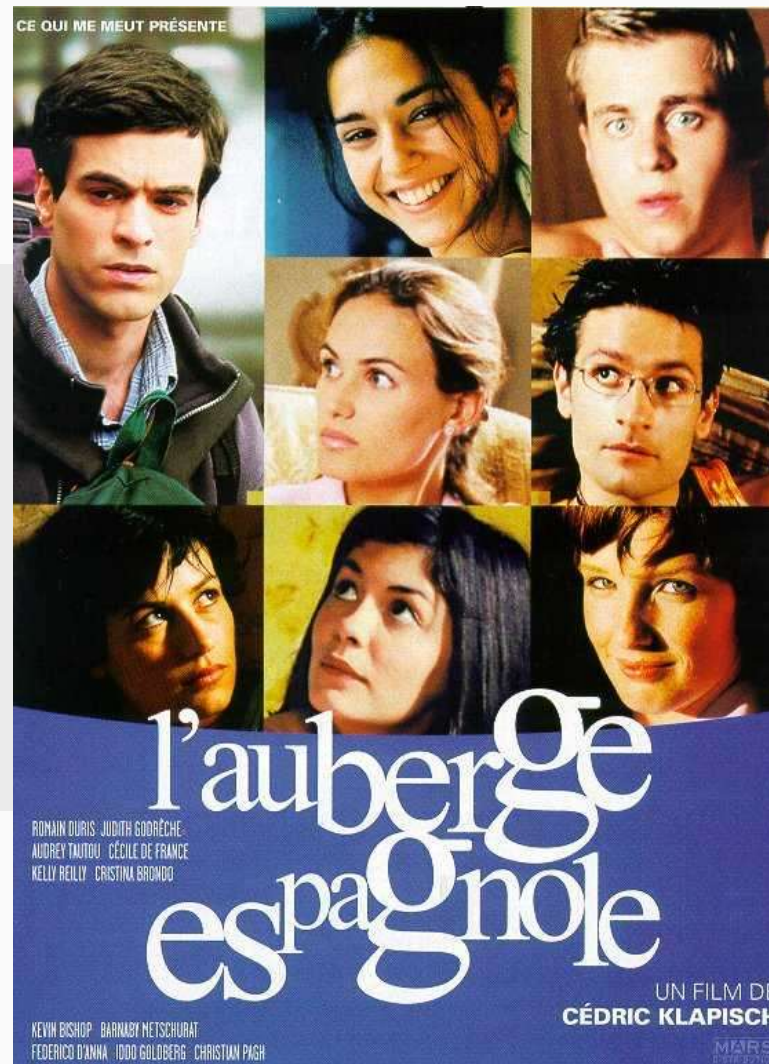












# TRANSITION TO WORK

The Experiences of Former ERASMUS Students

Ulrich Teichler and Friedhelm Maiworm



Higher Education Policy Series 28

ERASMUS Monograph No. 18



# AI Fast Development

You may live in interesting times...



May, 2022

A raccoon playing  
tennis at Wimbledon  
in the 1990s



# AI Fast Development

You may live in interesting times...



May, 2023

A raccoon playing tennis at Wimbledon in the 1990s



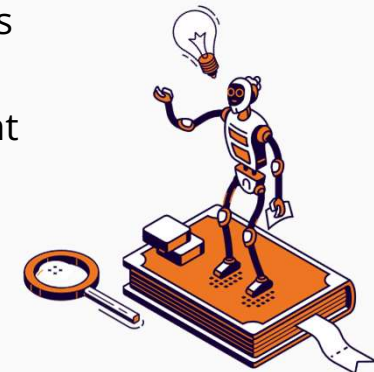
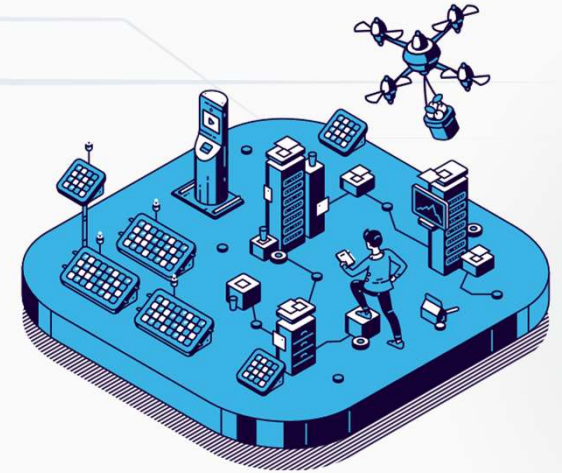
April, 2025

# AI is a Tool

Artificial intelligence is proposing to significantly impact our lives!



- Academia
- Agriculture
- Manufacturing
- Engineering
- Transportation
- Retail & Consumer Market
- Energy & Smart Spaces
- Healthcare
- Media & Entertainment
- Sustainability



# AI is evolving

Artificial intelligence is proposing to significantly impact our lives!



## **PERCEPTION AI**

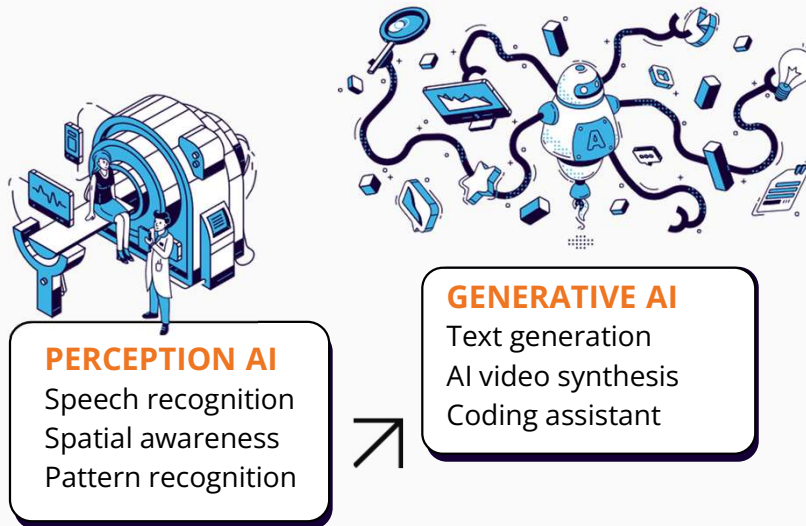
Speech recognition  
Spatial awareness  
Pattern recognition

from NVidia GTC Keynote 2025



# AI is evolving

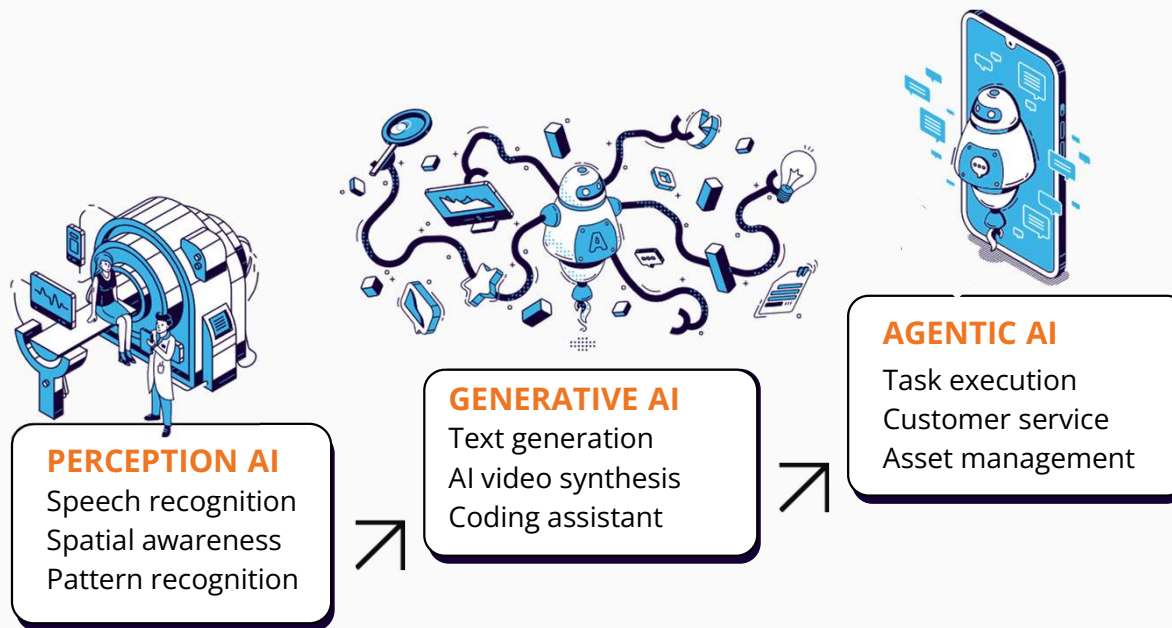
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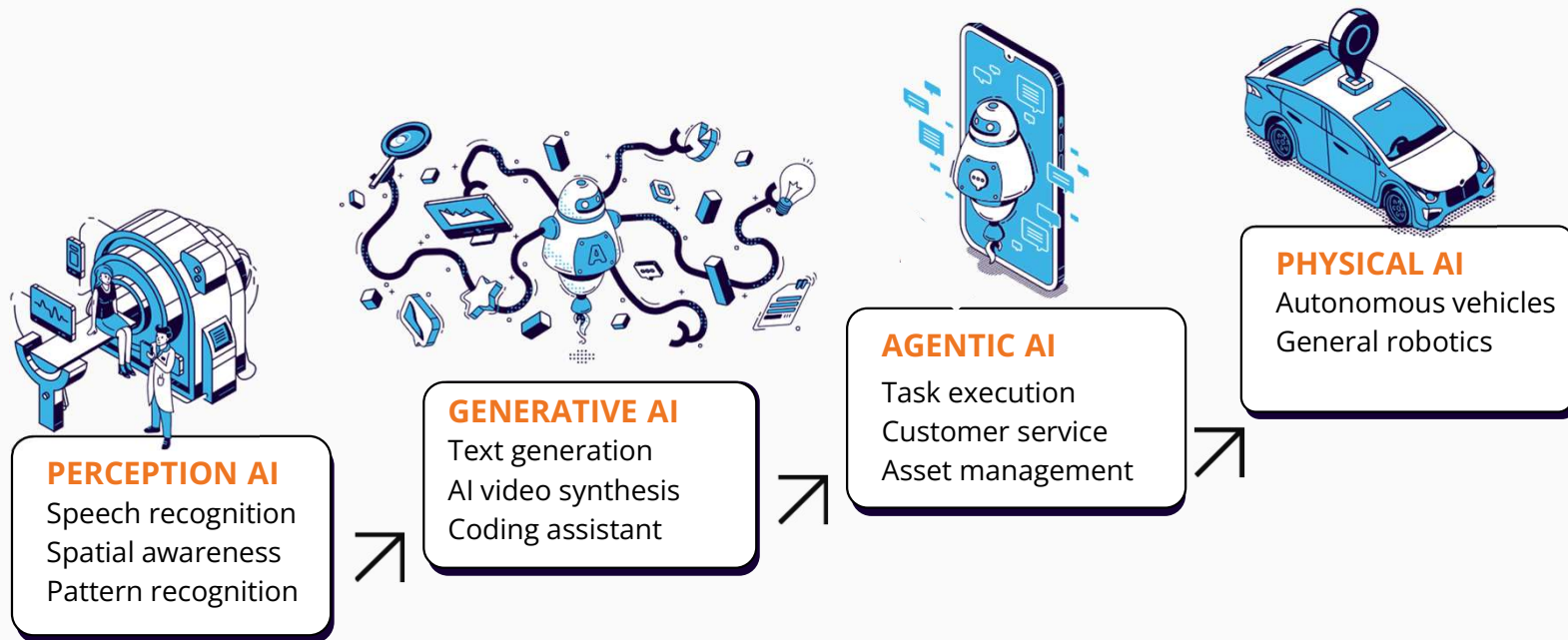
Artificial intelligence is proposing to significantly impact our lives!



from NVidia GTC Keynote 2025

# AI is evolving

Artificial intelligence is proposing to significantly impact our lives!



from NVidia GTC Keynote 2025



# A World race is on

BIGGER, FASTER, BETTER...



## AI REVOLUTION

Race for models,  
computer & innovation

# A World race is on

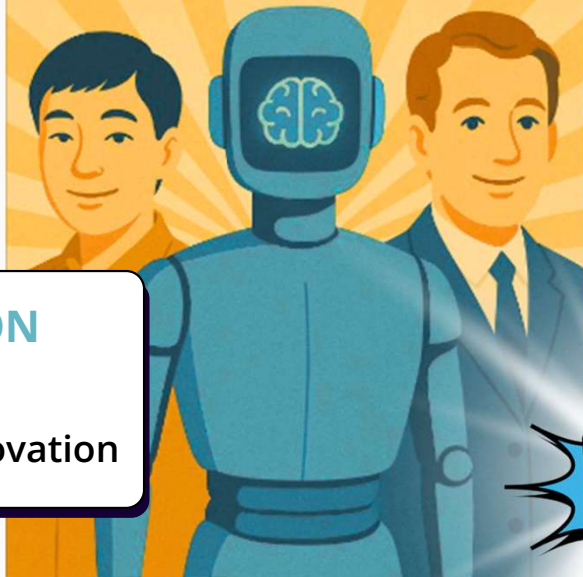
BIGGER, FASTER, BETTER...



## JOIN THE AI REVOLUTION

### AI REVOLUTION

Race for models,  
computer & innovation



# VS

## JOIN THE AI ARMS RACE



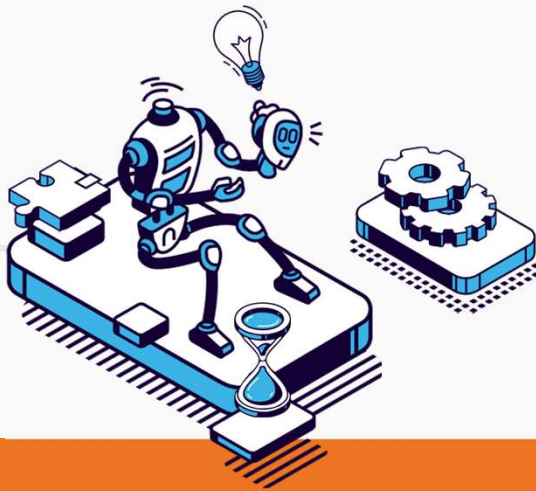
### AI ARMS RACE

Unscrupulous market,  
political & power  
driven...



# Impacts

- How AI will transform us, is yet to be determined.
- AI's ripple effects redefine our own future.
- We create our tools, our tools redefine who we are.



Knowledge  
& Skills



Autonomy



Values



Social  
connections



Individuality



# Breda University of Applied Sciences



**Breda**, the Netherlands  
Since **1966**

## **7.089 Students**

- 1.822 International students (26%)
- 103 Countries of origin



## **885 Employees**

- 182 International employees (21%)

## **177 Partner universities**



[BUas student data, October 2023]



# BUas Domains



Games



Leisure & Events



Tourism



Media



Data Science & AI



Hotel



Logistics



Built Environment



Facility



# From Practice to Framework

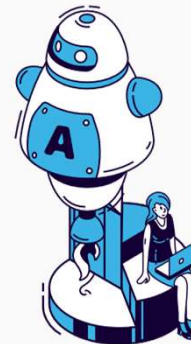
## The BUas Story



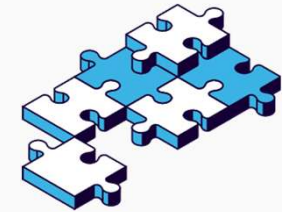
Not a top-down  
model



Developed through  
iteration, reflection,  
and collaboration



Focus on human behavior:  
*"AI changes how people work"*



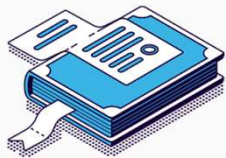
Cross-functional  
teamwork

*"We didn't approach AI from a technical-rational concept; we approached it from the idea that it changes people's behavior."*



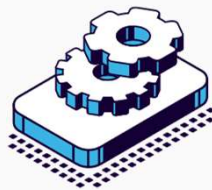
# Ambition

“BUas is a frontrunner in leveraging and maintaining AI as a transformative tool in education, operations and research, while keeping ethical considerations at the forefront.”



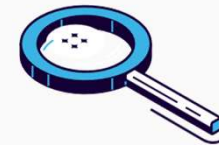
## Education

Leading in AI  
in the domains



## Operations

Human-centered,  
balancing efficiency with  
empathy & accountability



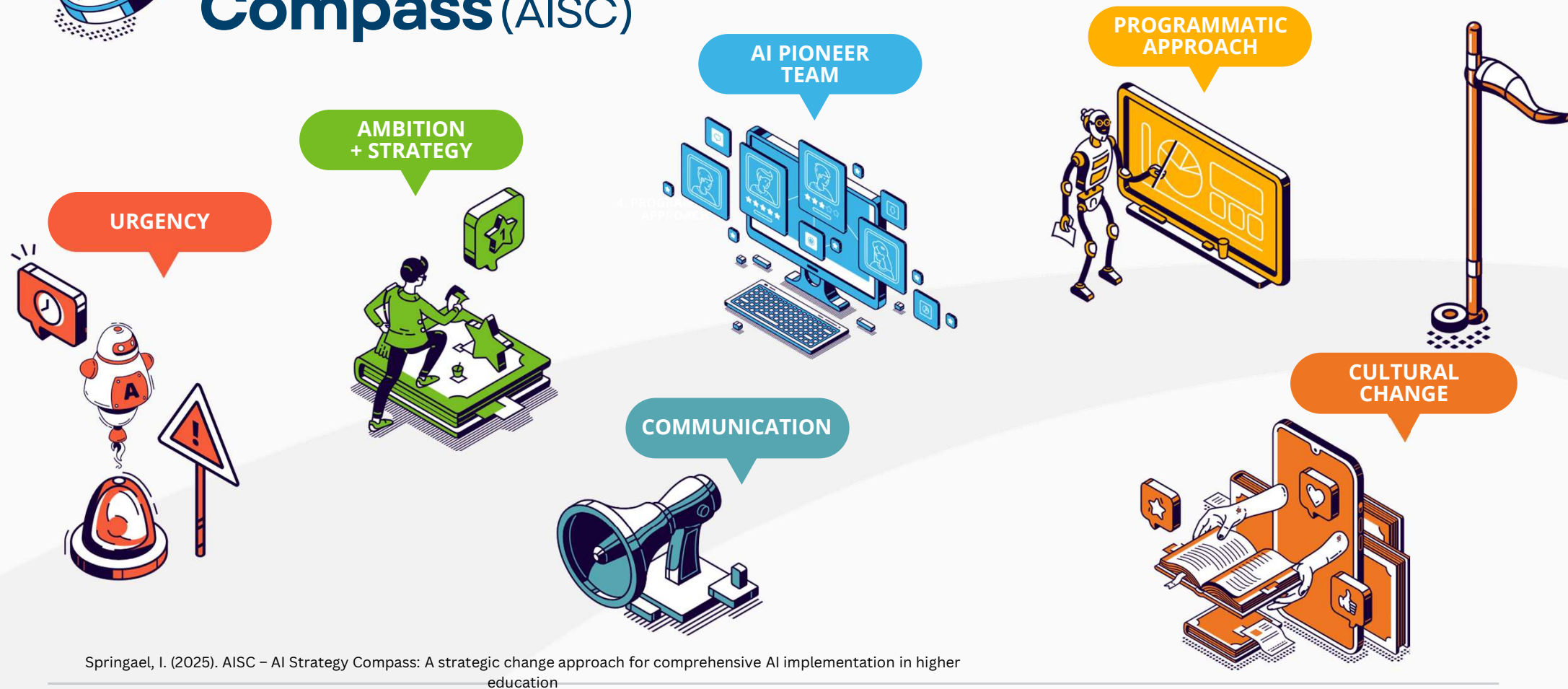
## Research

Integrating AI in research &  
innovation focusing on  
educational goals and  
industry needs





# AI Strategy Compass (AISC)



Springael, I. (2025). AISC – AI Strategy Compass: A strategic change approach for comprehensive AI implementation in higher education

# Urgency

## Creating Shared Purpose - Not Panic



Beyond crisis framing

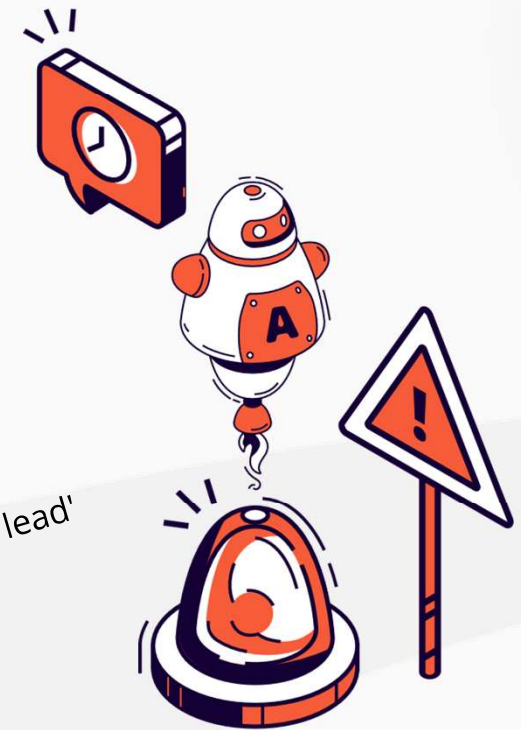


Build a collective sense of  
*"Why now?"*



Aligning external demands  
with internal aspirations

Moving from 'we must keep up' to 'we can lead'



# Ambition & Strategy

## From Vision to Strategic Direction



Rooted in  
institutional values



Measurable goals



Coherent across short  
and long-term plans

### Key insight:

Ambition without strategy = aspiration  
Strategy without ambition = directionless





# AI Strategy



## MEANINGFUL ENDEAVOURS

### Ambition

BUEs is a frontrunner in leveraging and maintaining AI as a transformative tool in education, operations, and associated industry and research domains while keeping ethical considerations at the forefront.



### Focus

#### Education

Leading in AI in the domains.

#### Operations

Human-centred, balancing efficiency with empathy and accountability.

#### Research & Innovation

Integrating AI in research and innovation focusing on educational goals and industry needs.



### Strategy

- Vision & Goals
- Talent & Development
- Curriculum Development & Assessment
- AI in Operations
- Infrastructure & Resources
- Data Governance & Ethics
- Research & Innovation



### Goal

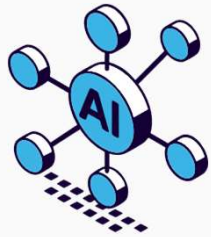
Integrating AI into all parts of the organisation promises to prepare students better for the future job market and also enhances possible cost savings within operations. By strategically leveraging AI, the institute can innovate in new ways that will bring quality, value and operational efficiency.



Onepager 

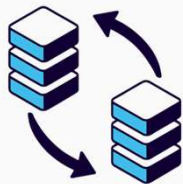
# AI Pioneer Team

## The 'AI Translators'



### Cross-domain coalition

- not only technical experts



### Bridge between:

- Technical possibilities
- Educational values
- Organisational strategy

Distributed leadership model

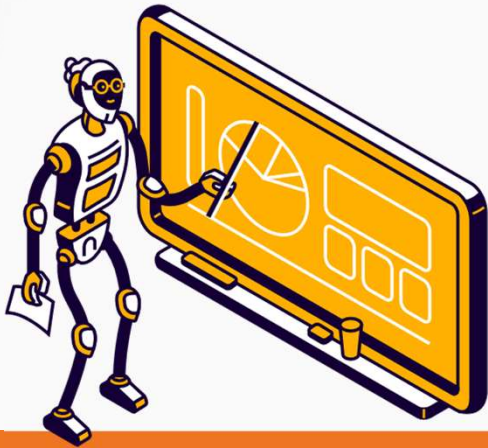
*"Let the people with knowledge lead"*



# AI Pioneer Team 1.0 & 2.0



# AI Ethics Policy



## AI Ethics Policy



### Personal Responsibility

At BUAs, we believe in the autonomy of the individual and their ability to choose responsibly when and how to use AI. We also expect and trust that the BUAs community critically reflects on the use and application of AI technologies.

Before using AI, we expect individuals to think carefully, thoughtfully, and emphatically about the aim and consequences. All of this in concert with, amongst others, the values listed below and BUAs' strategic goals. This personal responsibility, and therefore accountability, requires people to thoroughly assess the best course of action within the context in which they operate.

It requires individuals to weigh the benefits and drawbacks that the use of AI technology may produce. Am I using the right tool for the right purpose, process or outcome? Is it necessary, or merely convenient? Does it benefit the development of the student and/or colleague? Am I sharing private information?

Remember that by using this technology, some ethical dilemmas may arise and lead to negative effects, such as bias. These considerations help in determining which effects are acceptable for those involved and for BUAs as an organisation.

### VALUES



#### EQUAL ACCESS

We ensure that all individuals involved have equal access to AI platforms formally adopted or required within teams or groups.



#### TRANSPARENCY

Any Artificial Intelligence developed and used must be transparent regarding the model it employs and/or the sourcing of its data. Moreover, decision-making involving AI must be transparent.



#### FAIRNESS

One must consider both the advantages and potential disadvantages of AI systems in use. These should not disadvantage or harm any individual or group.



#### HUMAN AGENCY

Autonomy is a crucial factor. There must be a human in control and responsible when autonomous systems are at play.

### Fundamental Rules



AI cannot be adopted in a way that undermines the autonomy of individuals' actions.



Individuals will always be held responsible for the use of AI-generated output.

### Organisational Duties



- Create a critical assessment of AI system purchases or in-house development.
- Adhere to the data governance policy, which must be reviewed regularly.
- Acknowledge and maintain the value of critical thinking and responsible AI use.
- Dedicate ourselves to promoting sustainable AI practices.
- Continuously develop and improve educational materials and training on (responsible) AI practices for students and colleagues to help them develop and use AI responsibly.
- Acknowledge and maintain the value of autonomous thinking and learning in curricula, research, and operations.



Onepager





# Vision on teaching and learning with AI



## The student as AI-informed professional

Our students develop critical AI literacy through explicit training and real-world application in their domains. They recognise that strong domain expertise is key to using AI effectively. They maintain autonomy in their AI journey by understanding how to make informed decisions about AI and the subsequent consequences of their choices. Students graduate as adaptive AI practitioners committed to continuous learning, equipped to evolve alongside rapidly advancing technologies and thrive in fast-evolving industries.

*"Students choose responsibly when and how to use AI, thinking critically about the capabilities and limitations of AI in their contexts."*

## The lecturer as AI-informed mentor

Our lecturers are supported by comprehensive training and resources. Through mandatory AI courses and ongoing professional development, our lecturers guide students in the responsible and effective use of AI. They create learning experiences where AI supports pedagogical goals and maintains academic integrity without replacing human connection. They facilitate and support students' transformative learning processes.

*"Lecturers are confident in using AI to enhance teaching and learning while maintaining human connection and critical thinking as our subject experts."*

## The professional who integrates AI for social impact

We educate students to become professionals who develop and implement ethical-by-design and sustainable-by-design AI while engaging in critical dialogue about societal implications and collective action to address complex challenges. Through real-world projects with industry partners and practical challenges, focusing on societal issues, students learn to balance technical capabilities with ethical implications. Preparing them to shape an AI future that respects European values and cultural diversity while meeting industry demands.

*"Graduates who advocate for ethical and sustainable-by-design AI while maintaining industry readiness."*

## Evidence-informed AI integration as guiding principle

Our AI education uses transparent frameworks and comprehensive support systems. We provide everyone with free and thus equal access to high performing tools that are safe and privacy protecting. We create evidence-informed approaches for our unique context that ensures quality, transparency, and academic integrity while preparing students for future careers.

*"Clear guidelines and transparent communication ensure students & staff understand when, how, and why AI is used."*



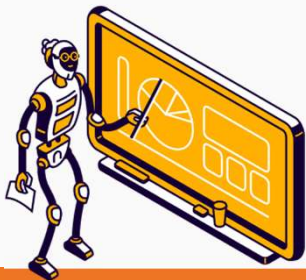
## Integration principle

These four pillars work together to create a learning environment where AI is not just a technological addition, but a fundamental enabler for deeper learning, human development and societal impact.

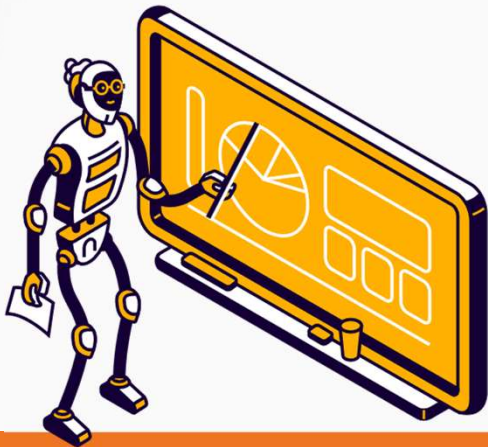


## Our promise

Through this integrated approach, we prepare students and staff not only to use AI effectively, but to lead responsibly within their professional domains.



# AI Usage Guidelines



## AI Usage Guidelines

These guidelines provide the institutional clarity our community has been seeking. They bridge the gap between our strategic AI vision and daily operational needs, ensuring consistent and responsible AI application across all academic and operational domains.

The guidelines operationalise the core values established in our AI Ethics Policy: Equal Access, Transparency, Fairness, and Human Agency.



### ACADEMIC INTEGRITY AND INAPPROPRIATE USE PROCEDURES

**'If AI can trivially solve an assignment, the assignment is the problem and AI detection tools are unreliable, so assessment redesign is advisable.'**

#### This means:

- If a student can easily get AI to do the entire assignment with minimal effort, then the assignment itself is poorly designed - not the student's fault for using AI.
- We can't depend on technology to catch AI use because these tools don't work well enough. Instead of trying to police AI use, we should redesign our assignments to be AI-resistant or AI-integrated.

### PROVIDING FEEDBACK AND ASSESSMENT

**'AI can be used to support the assessment process and enhance feedback quality, though it requires a well-designed educational and assessment process from the start and there must always be a human in the loop. The lecturer remains fully responsible for the final assessment.'**



#### This means:

- AI is allowed as a tool to help with grading and giving feedback to students.
- AI can help provide more detailed, timely, or personalized feedback than might be possible manually.
- You can't just throw AI at a poorly designed assessment and expect good results - the foundation must be solid first.
- AI cannot make final decisions about grades or student performance - humans must review and approve.
- Even if AI helps with feedback, the teacher is still accountable for all grading decisions.



### DATA UPLOAD GUIDELINES

**'With Claude you are able to upload your data in a safe manner, when using any other AI solution, do not upload privacy-protected or any sensitive data without the tool being checked by the advisory committee.'**

#### This means:

- Claude has been vetted and approved for handling BUAs' data safely.
- By 'any other AI solution', we mean any tool other than Claude.
- Student information, grades, personal data, internal documents or privacy-protected data should not be shared.

New AI tools must be security-reviewed before sensitive data can be used with them.

### GUIDELINES FOR VARIOUS AI PLATFORMS

**'Claude is our main LLM platform. If other AI solutions are needed, go to the AI Advisory Committee/ AI Pioneer team. If there are no alternatives, and the proposed solution is in line with our privacy, risk and data safety policies, the Committee will give positive advice to the MT member or director who is responsible for making the final decision. BUAs can only be held responsible for AI tools that are approved as compliant by the advisory committee.'**



#### This means:

- This is BUAs' officially approved and preferred AI tool.
- Don't just start using random AI tools - get approval first.
- The committee evaluates data security, potential problems, and whether Claude could do the job instead.
- Local leadership has final say on what tools their academy uses and pays for.
- The institution only provides support, takes liability, and ensures compliance for officially approved tools - if you use unauthorized AI tools, BUAs cannot be held responsible.

#### NOTE:

- 1) When we refer to "Claude", we mean its access through your BUAs email, with Single Sign-On (SSO).
- 2) These guidelines undergo regular review to ensure approved tools continue to meet our standards. Employees are responsible for staying informed of any changes.



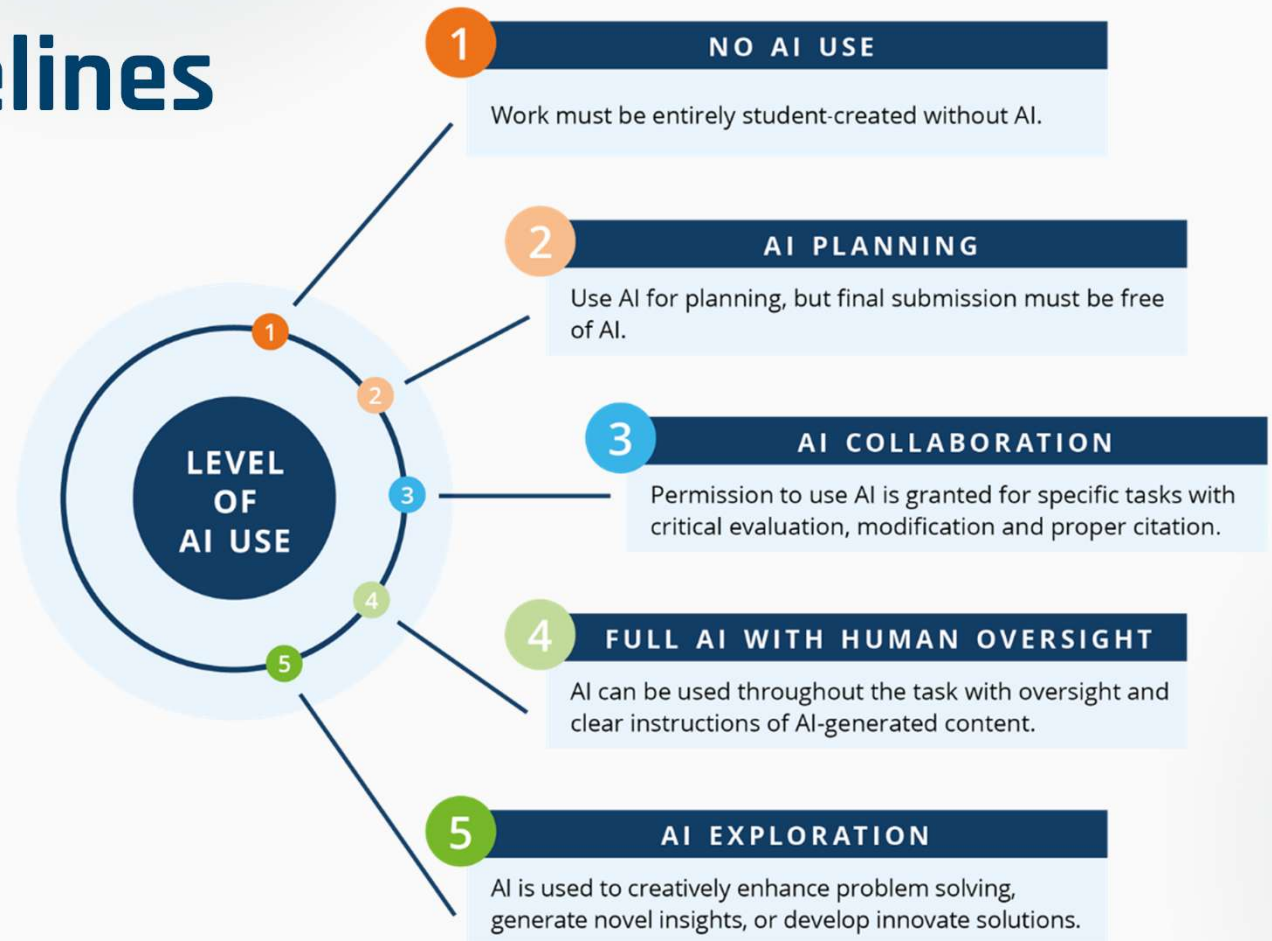
# Student AI Guidelines

## Levels of AI Use

### What are these levels?

The five levels define the extent of AI integration into academic tasks, ensuring clarity on the conditions of AI use—whether it is permitted, in what form, and to what end.

- From v.1 to v.2.
- This is not a programme level tool.
- Each level is suited to different practical or cognitive skills.



This scale is based on AIAS (AI in Assessment Scale) as could be found on [www.leonfurze.com](http://www.leonfurze.com)

# Assessment Framework

AI IN THE CURRICULUM AT  
BUAS

## LEARNING OUTCOMES

Course-specific ILO's + AI specific ILO's

- Identify skills that AI enhances rather than replaces
- Integrate both technical AI competencies and ethical considerations
- Ensure outcomes reflect real-world AI applications

Verify achievement  
of intended  
competencies

Define what to  
teach WITH and  
WITHOUT AI

## LEARNING ASSESSMENT

The TWO-LANE APPROACH

- Choose assessment methods that align with AIAS levels
- Balance AI-assisted and AI-free assessments to validate full spectrum of student capabilities
- Maintain the integrity and credibility of BUas qualifications.

## LEARNING ACTIVITIES

With the AI ASSESSMENT SCALE (AIAs)

- Match AIAs levels to specific ILO's
- Design activities that develop critical AI evaluation skills
- Provide sufficient scaffolding when introducing AI tools
- No AI? Set students up for success and ensure activity design is AI-resilient.

Select methods that  
validate authentic  
learning

EDUCATION IN THE AI-DRIVEN  
WORLD





# AI-integrated and AI-proof assessment

## AI has disrupted traditional assessment

- This isn't about compliance, it's about empowerment through transparency.

How can we confidently state that our graduates possess the competencies their diploma promises?

## IMPLEMENTATION ACTIONS



### Programme level

#### Step 1: Mapping

**Action:** Map where your ILO's are currently being assessed. This means creating an overview of your entire curriculum - which unit ILOs exist and where they are tested.

**Output:** Assessment landscape overview - you can see the whole picture

#### Step 2: Lane determination

**Action:** For each indicator or phase, determine: Is this Lane 1 (must be done without AI) or Lane 2 (can/should be done with AI)?

**Output:** Strategic lane allocation - you know which competencies require independent demonstration

#### Step 3: Design

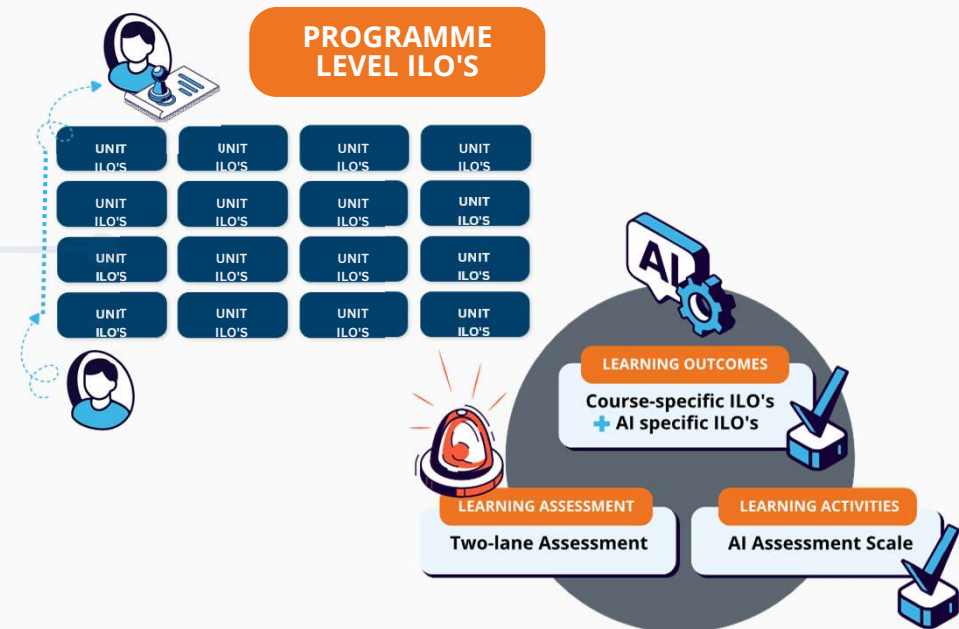
**Action:** Create your ideal assessment architecture. Don't just map what exists - design what SHOULD exist. Where do Lane 1 and Lane 2 belong in your programme?

**Output:** Target state model - the vision of how assessment should work

#### Step 4: Gap Analysis

**Action:** Compare your current situation (as-is) with your ideal (to-be). Identify where gaps exist and what needs to change.

**Output:** Implementation priorities - you know what to tackle first.



### Unit level

#### Step 5: Concrete design

**Action:** Teachers work together within their 15 EC unit to design the actual Lane 1 and Lane 2 assessments. This is where strategy becomes concrete reality.

**Output:** Assessment specifications - actual assessments designed per unit

#### Step 6: Transparency

**Action:** Document and communicate clearly: What AI use is permitted, prohibited, and required in each assessment? Make this transparent for both students AND faculty.

**Output:** Transparency framework - everyone knows the rules

#### Step 7: Team Alignment

**Action:** Ensure all teachers within a unit work together to maintain consistent lane choices and standards. This cannot be done by individual teachers working alone.

**Output:** Shared standards - consistent approach across the unit.

# AI Tools

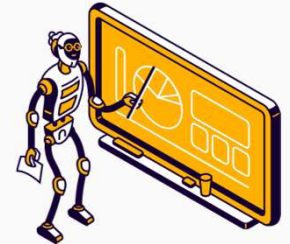


## DID YOU KNOW?

BUas became the first EU University of Applied Sciences to implement institution-wide Claude for Education access, replacing fragmented individual AI subscriptions with a comprehensive site-wide license providing equitable access to all staff and students.




# AI Experiments




BUas AI Assistants

My AI Assistants



ADS&AI - Year 1A Assistant

An assistant that helps students with what is required of them for their projects




Test

Test

BUas AI Assistants


There are no official BUas AI Assistants yet...

Community AI Assistants



ADS&AI - Year 1A Assistant

An assistant that helps students with what is required of them for their projects



Pepper

ADS&AI Open Day Assistant

In line with our commitment to fostering innovation and collaboration, BUas offers grants for AI Experiments!





# Operations use cases



## P&O AI for recruitment

- Experiments with the use of Claude to rank candidates who applied for a position and to make a first selection based on their profile and criteria given to Claude.



## MC&S

- Exploring with Claude ways to translate complex documents in Dutch to English and vice-versa.
- Creating chatbot for prospective students.



## ER&IM Policy Advice

- The team of Policy Advisors within BUas is now using Claude to create complex policy advice documentations.

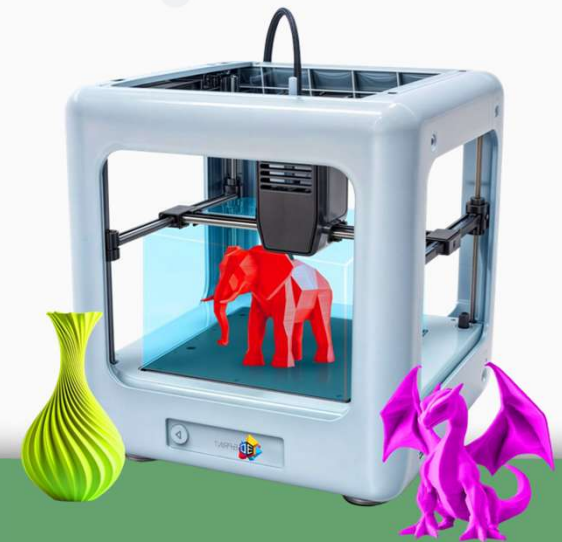


## Service Desk

- We have now build an internal chatbot with the 10 most frequently asked questions to service desk to ease the burden of answering repetitively - which is now working perfectly fine and we are seeking the best location to place it for people to interact with it.



# AI Maker Space



The AI Makerspace serves as an innovation hub for students, lecturers, and researchers to prototype and demonstrate robotics and AI projects before scaling them into larger institutional initiatives.

# Mandatory AI Training for all staff

Our AI Training Team:



Bas Walhout



Boyd Catsman



Cheyenne Kuil



Courtney Robinson



Miroslav Goranov

# Training Overview

## Three themes within the AI modular training:

- AI Literacy
- AI Ethics
- AI Pedagogy



28 Intended learning outcomes (ILOs) related to areas of the TPACK model.



**edubadges** available to staff to motivate and reward AI training completion.



ILOs set cross three competency levels (Fundamental, Advanced and Expert).



Unique modules offered for research and operations staff.





# AI Advanced Courses

## Mandatory Modules - Lecturers:

AI Ethics

AI Literacy

AI Pedagogy  
& Assessment



## Mandatory Modules - Operations:

AI Ethics

AI Literacy

AI in My Job

## Mandatory Modules - Research:

AI Ethics

AI Literacy

AI in Research

# Internal & External Communication



SharePoint

Meaningful AI Endeavours

Artificial Intelligence (AI) is evolving swiftly, and at BUAs, we are committed to equip you with the required skills. By actively involving experts, students, and staff in practical projects, BUAs strongly emphasises creating impactful, real-world AI operations that contribute to the advancement of education, industry, and society as a whole.

AI Strategy

AI Meaningful Endeavours | Portal

Discover how AI is shaping the future of education at Breda University of Applied Sciences. Learn about the latest ways AI is being implemented across our programmes and projects. Stay informed of BUAs' guidelines on AI usage and tools to ensure responsible and effective practice. Whether you're just getting started or looking to deepen your knowledge, here you find tips and insights to help you dive into AI. Boost your skills with our diverse range of workshops, events, and trainings designed to support your growth and professionalization in this cutting-edge field.

Keep an eye on your new favourite SharePoint portal for content about Artificial Intelligence. Follow @bredauniversiyas or this portal page and don't miss out on our special AI Fridays!

LATEST NEWS

Brand-new training available: AI for Research Introduction

A new AI training has launched, and you now have...

Updated AIAS (2025 - 2026)

AI Assessment Scale (AIAS)



bredauniversiyas

1,627 berichten 12,8 d. volgers 278 volgend

Breda University of Applied Sciences (BUAs)

International university (AS) in the Netherlands

31 study programmes: bachelors & masters

Share your BUAs experience: tag... meer

Vertaling weergeven

linktr.ee/buas en nog 2

Professioneel dashboard

692 d. weergegeven in de afgelopen 30 dagen.

Bewerken Profiel delen Contact

OAA Studie... AI TIPS ROOM TO... SUJSTAINA... Gs\_A Ci

I want to use AI for my study

Hugo Student



## BUAs website

### Showcasing BUAs' Leadership in AI at the 2nd Annual Teaching and Learning with AI Conference

In September, Breda University of Applied Sciences (BUAs) proudly participated in the 2nd Annual

### 'Why We Need to Adapt AI Use in Our Curriculum'

Breda University of Applied Sciences (BUAs) is at the forefront of integrating artificial intelligence (AI) into education, equipping students with...

### Students Francisco Ribeiro Mansilha and Lea Banovac use AI to detect brain tumors

As third-year Applied Data Science & AI students at Breda University of Applied Sciences (BUAs), Francisco Ribeiro Mansilha and Lea Banovac

### Lecturer in the Spotlight: Myrthe Buckens

In this first edition of our 'Lecturer in the Spotlight' series, we are highlighting Myrthe Buckens, a lecturer in the Applied Data Science &...

<https://datascience-ai.buas.nl/>

## Keynotes



# Focus 2026

Phase 1: 2023 - 2025

## Foundation-Building

Infrastructure & Policies  
Platform & Tools  
Awareness Training



## Meaningful Engagement

Human Readiness  
Development



Phase 2: 2026 - 2028

## Human Readiness

Genuine AI Engagement  
Culture Transformation  
Human Development



# Research

## Projects & initiatives

- Expert Team of Researchers & Developers

Areas:

- ▶ Digital Twins and 3D Worlds
- ▶ Augmented Reality & GIS Mapping
- ▶ Computer Vision & Autonomous Robotics
- ▶ Large Language Models
- Linked with Multiple EU Funded Projects

INDUSTRY-FOCUSED

INNOVATION

SOLUTIONS



**Carlos Santos**

Transversal Professor in  
Applied Data Science & AI



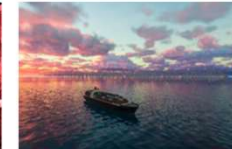
European  
Union



European Tourism Data Space



Knowledge & Creativity  
European University





# To Look Forward to



## CONFERENCE

**19-20 October, 2026**  
**BUas Campus**  
**Breda, Netherlands**

### Teaching and Learning with AI in Europe

Our goal is to establish cross-border collaboration in Europe to share ideas, best practices, and innovations in AI in higher education.

**KNOW MORE**



**UNIVERSITY OF  
CENTRAL FLORIDA**





# EU Strategy for AI and Digital Technologies

# EU Digital Sovereignty

## Digital Autonomy Gap in Europe

European institutions increasingly rely on non-European technology solutions, creating dependencies that compromise data sovereignty and technological self-determination.

Developing Europe's own secure, integrated research platforms enhances digital autonomy, resilience, and aligns with public innovation values.

Contributes directly to Europe's strategic goal of technological sovereignty, ensuring control over research data and processes.

## Opportunity for Innovation

A collaborative, Europe-based AI research platform strengthens the innovation ecosystem, benefiting universities, public institutions, and European companies through shared resources and secure, ethical technological advancement.



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# Geopolitical Dimension

## Threats

- Security & Critical Infrastructure Protection
- Legal & Jurisdictional Vulnerabilities
- Economic Competitiveness
- Democratic Governance & Values
- Geopolitical & Strategic Resilience Autonomy

Who controls the elements that shapes society?

## The geopolitical dimension

Key countries and leading firms in each stack layer

	KEY COUNTRIES				KEY FIRMS
Data and artificial intelligence	US		China		OpenAI, Microsoft, Google, Meta, Anthropic, XAI, Amazon, Baidu, Tencent, Alibaba, DeepSeek
Software	US	China	Germany		Microsoft, Apple, Alphabet, Meta, Amazon, Salesforce, SAP, ByteDance, Tencent
Cloud	US		China		Amazon, Microsoft, Alphabet, Alibaba
Internet of things & devices	US	China	Korea	Germany	Amazon, Google, Apple, Samsung, Huawei, Bosch, Siemens, Xiaomi
Networks	US	China	Europe	Japan	Huawei, Nokia, Ericsson, ZTE, SpaceX, NEC
Chips	Taiwan	Korea	US	Netherlands	TSMC, Samsung, Intel, NVIDIA, AMD, ASML
Raw materials, energy, and water	US	China	Russia		Chinese government (through SOEs e.g., China Rare Earth Group), ExxonMobil, Gazprom

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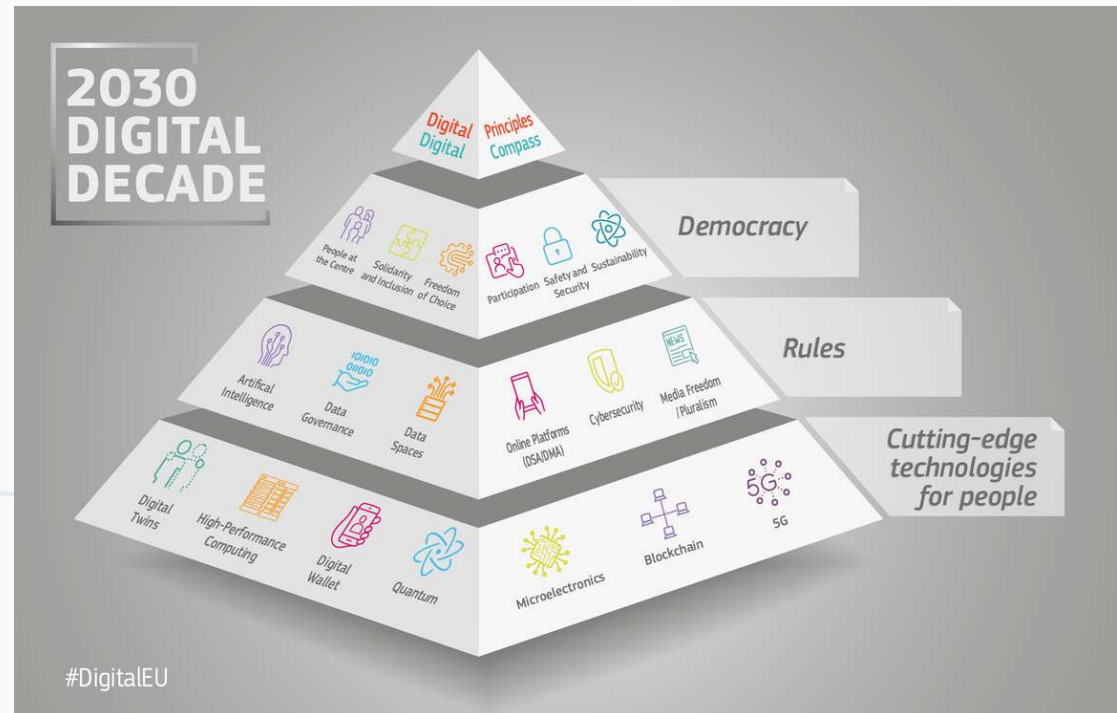


# Europe's Digital Decade: Targets for 2030



EU is focusing on 2030 Digital Decade, and announced 1,910 measures worth €288.6 billion.

**1.14% of EU GDP**



[Towards a sovereign digital future – the Netherlands in Europe](#)  
[Digital Strategy 2030](#)

# Some numbers

	United States	European Union	China
2013-2024 Total Investment	\$3-4 trillion	\$0.8-1 trillion	\$1.5-2 trillion
Current Compute Global Share	74%	4.8%	14%
Predicted 2025 Annual Investment	\$450-500 billion	~\$20-30 billion	~\$80-120 billion
Approach	Private sector-led, massive scale	Regulatory-led, fragmented investment	State-directed industrial policy
Concentration	Extreme - 8 companies capex invest \$371B	Dispersed across 27 countries	Coordinated nationally
2025 Per capita Investment	(335M) \$1 300 - \$1 500	(450M) \$44 - \$66	(1.4B) \$57 - \$86

# Digital Gap Analysis

## The biggest gap isn't infrastructure

It's the execution gap between regulatory ambition and operational capability.

Europe has the policies but lacks:

- Sufficient capital deployment.
- Competitive alternatives to US hyperscaler companies.  
(Microsoft, Amazon, Google)
- Adequate know-how.



Source (April 2025): [2025 State of the Digital Decade](#)

# Data Sovereignty & Governance



## Strategy

All data is valuable to improve systems, train models, simulate. European data is irreplaceable - maintain sovereign control while using hyperscaler infrastructure strategically. Build data as your competitive moat.



## Implementation

- **Data Inventory & Classification** by audit and classify what data you have and where it lives.
- **Storage strategy** for sensitive data, build with portability and exit strategy.
- **Clear policies:** Access, retention, sharing, incident response.
- **Compliance:** GDPR, AI Act, NIS2, regular audits and penetration testing.



# AI Literacy & Workforce Transformation

## Strategy

Europe's biggest gap isn't capital - it's people. Transform your workforce into AI-native talent through systematic, comprehensive upskilling. Create competitive advantage through organizational capability, not just technology.

## Implementation

- **Assessment:** understand the current AI knowledge, and define a strategy.
- **Leadership & Culture:** hands-on executive AI training, not PowerPoint.
- **Change management:** Address fears, celebrate wins, create safety and career progression.
- **Structured Training Programs:**
  - Level 1 (90% target): Basic AI awareness - ethics, capabilities, limitations.
  - Level 2 (60% target): Applied tools - ChatGPT, Copilot, role-specific AI.
  - Level 3 (30% target): Power users - advanced prompting, workflow automation.
  - Level 4 (5-10% target): Specialists - ML engineering, deployment, research.



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# Compliance & Trustworthy AI

## Strategy

Turn EU regulation from burden into competitive advantage. Build trust, transparency, and ethical AI systems that become market differentiators and trade barriers protecting European markets. Be compliance-first, then export that expertise globally.

## Implementation

- **AI Governance Office:** Establish cross-functional team for Legal, IT, Ethics, Risk, Business.
- **Risk classification:** Map all AI to AI Act categories (unacceptable/high/limited/minimal risk).
- **Technical Implementation for Trustworthy AI:** Documentation & traceability (AI system registry, model cards, audit trails).
- **Compliance Implementation:** AI Act, NIS2, ISO/IEC 42001, EUCS Level High.
- Organizational Processes with human oversight.
- External Positioning & Market Advantage: "Trustworthy AI".

# Experimentation, Applied & Efficient AI

## Strategy

Systematic experimentation beats analysis paralysis. Allocate and encourage rapid AI experiments. Focus on efficient, sustainable AI that delivers ROI without hyperscale infrastructure. Learn by doing, fail fast, scale winners.

## Implementation

- Identification of opportunities and ROI, listen to your staff, understand pains.
- **Rapid prototyping:** quick cycles, expect 70% "failure"rate, 3-6 month then kill or scale.
- **R&D/AI Garage/Innovation Lab:** Safe sandboxes, no ROI required for experiments, track learnings.
- **Partnership Models:** Industry consortia, University partnerships & innovation challenges.
- Link and scale up using National and EU Funding.



# Strategic Partnerships & EU Funding

## Strategy

Master the art of funding capture and strategic partnerships. Stack multiple funding sources, participate in multi-country projects, align with policy priorities. Make use of € 288,6 bi Digital Decade budget.

## Implementation

- **Stack Multiple Funding Sources:** Horizon, Digital Europe, EU Social Fund, National Funds.
- **Align with EU Policy Priorities:** Sustainability, Skills development, Strategic autonomy, SMEs.
- Collaborate in International cooperation, and partnerships.
- **Build reusable partnerships:** Academic, industry, public sector mix.
- Exploit knowledge transfer and commercialization pathways.

# Vertical AI Solutions

## Strategy

Build industry-specific AI that hyperscalers won't. Partner within verticals to create specialized solutions for "too small" markets.

## Implementation

- European industrial companies understand European industrial needs.
- **Industry-Specific Vertical Solutions:** Domain specific.
- Build Consortia Within Verticals.
- **Develop clear stack components:** Don't build entire hyperscaler, but missing pieces.
- **Open Source Strategy:** Build on European AI: Mistral, Aleph Alpha, open LLMs.
- **Values alignment:** Sustainability, equity, privacy by design.

# Thank You!

AI Buas website

