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P4ELECS
Platform for Electrification Skills & Competences

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P4ELECS WP8
Co-creating Skills Ecosystems

System Mapping Results from The Netherlands

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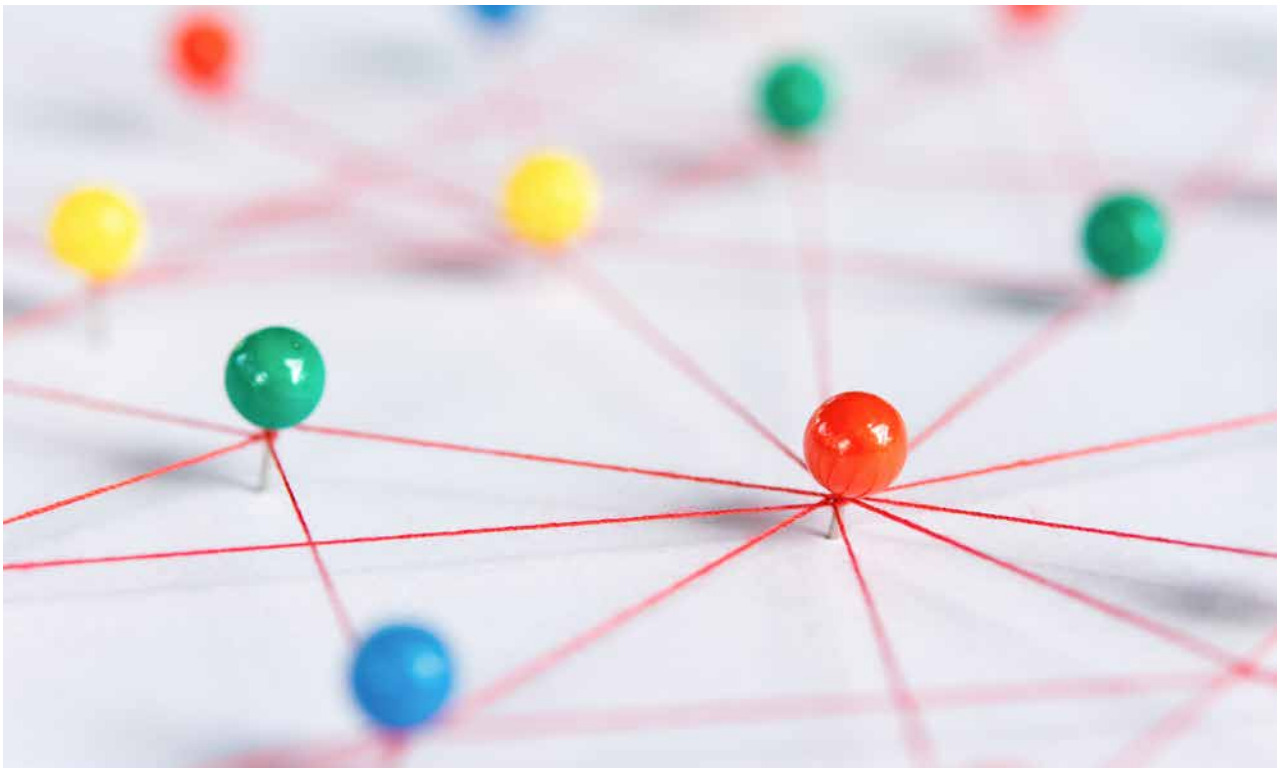

1.1 PROJECT INFORMATION

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1. Results. The Netherlands:

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GLOSSARY

BB Building Block
Piece of educational material, consisting of elements (reader, PowerPoint presentation, video, exercises, self-assessment with answer keys, …) related to a particular question or topic.

BBP Building Block Platform
BBP is hosted by Xdemia

CDIO Conceive, Design, Implement, Operate.
Based on the CDIO initiative of MIT

ECOSYSTEMS ROLES (Dedehayir et al 2018)

- leader (it sets up governance through designing roles of the actors, coordinate interactions at both internal and external level, orchestrate resources flows, define platform architecture attracts partners stimulates investments, stimulate value appropriation for producers and end users; as dominator it conducts mergers and acquisitions)
- Value-creation (suppliers, assemblers, platform complementor or user)
- Support (expert or champions in needs of technology or knowledge or other competences, it generates knowledge, encourage technology transfer and commercialization, or build connections among actors, provide access to the market, interacts between partners and subgroups)
- entrepreneurial (entrepreneur or sponsor)
- regulator (definition of laws, provides economics reforms, loose regulatory restrictions).

HEI Higher Education Institutes

INNOVATION ECOSYSTEM

A dynamic, interconnected network of diverse actors and resources that collaborate to drive innovation and create value, a system where innovation is not just a solitary act but a collective, collaborative process.

MATURUTY LEVELS (Moore 1996+ Jutting 2024):

1. birth- emergence of the ecosystem: definition of value proposition among partners, identification of stakeholders. Problem definition, collaboration design, resources definition
2. expansion: value proposition capture value for many stakeholders and make possible the concept scale up to a broader or new markets. needs perspectives, solution components identification, additional knowledge
3. authorities: value adding components and processes are stable and leaders set direction for partners to work together. Implementation capacity, dissemination, political regulation
4. renewal: new ideas and new innovations. Ecosystem value proposition refinement, foresight, impact evaluation

SESCO Skills Ecosystem Coordinator
Individual supporting the establishment of a skills ecosystem, a collaboration between education, government, industry and research to support learners and employees in acquiring requested skills (skills intelligence) and competences.

SKILLS ECOSYSTEM

a network of interconnected actors—including research, education providers, industry, policymakers, and civil society—that collaborates to ensure people acquire relevant skills in an evolving labour market

SPIDER CDIO map that contains BBs relevant to the topic of the spider

SPIDERCO Spider coordinator
Individual responsible for the content and quality of a spider

VET Vocational Education and Training

1.Results – The Netherlands

1.1 The Context

The Netherlands presents a highly advanced electrification ecosystem, characterized by strong research capacity, ambitious public policy, and a dense network of innovation actors. Despite this maturity, the ecosystem is currently constrained by structural fragmentation within the skills and workforce landscape.

Analysis based on interviews with seven key stakeholders reveals a persistent disconnect between the **Innovation System** (research institutions, public funding instruments, startups, and policy frameworks) and the **Implementation System** (installers, SMEs, grid operators, and vocational training providers). While innovation activities are well supported across Technology Readiness Levels (TRL) 1 to 9, insufficient attention and resourcing are directed toward the translation of innovation into standardized skills, training pathways, and workforce readiness beyond TRL 9.

Fragmentation between innovation and market implementation, specifically:

- **Innovation reaches market readiness, integration does not:** interviewees describe a gap emerging after technologies reach **Technology Readiness Level (TRL) 9**, when market readiness is assumed but organizational, educational, and workforce integration remains limited.

- **Funding prioritizes novelty over uptake:** attention and resources are described as remaining focused on developing new innovations, with little allocation toward supporting how existing technologies are absorbed into organizations or educational contexts.

  "Nobody thinks, hey, we should have one to five percent of this amount of money to see how does this new innovation land in our organisations or in educational purposes."

- **Implementation is project-based and short-lived:** rather than shared or sustained infrastructure, initiatives are frequently organized as standalone projects that conclude when funding ends, resulting in fragmented resources and limited continuity.

  "Everyone makes their own foundation, their own website, their Academy… Everybody makes their own niche… they all whine. Nobody comes on our… nobody visits our website."

- **Prototyping outpaces early adoption:** from a market perspective, interviewees note a disconnect between developing new products or solutions and finding actors willing to adopt them at an early stage.

- **Risk aversion limits first-mover uptake:** even when innovations exist, adoption can be constrained by a lack of market actors willing to take on the initial risk associated with being the first buyer or user.

  "If you come up with a nice idea, but nobody is willing to take the risk to buy the first product… you're gonna have a hard time there."

Fragmentation between theory (education) and practice (reality), specifically:

- **theoretical training diverges from hands-on practice:** interviewees describe differences between what is taught in educational programs and the practical realities of working with electrical systems. EQF 5 is not well enough developed.

- **limited exposure to real equipment during education:** graduates may complete relevant degrees while remaining unfamiliar with the physical infrastructure and tools used in practice.

  "I graduated on power quality… and then I was like, they gave me a machine in my hands… and I was like, what is this? Because I only know it from PowerPoint and books."

- **inconsistent engagement with technical documentation in practice:** installations are described as sometimes being carried out without close attention to manuals or specifications.

  "Installations are being done by people that don't even read the manual."

- **education cycles move slower than market demand:** interviewees point to a temporal mismatch between long educational development cycles and rapidly evolving industry needs.

  "We have to do it still with the old world who has a development cycle of seven years. And the necessity of the market? Who wants something within nine months?"

- **shift toward broad 'energy' education over technical specialization:** educational programs are described as emphasizing general energy topics rather than specialized electrical engineering skills.

  "We focus on energy broad… but we want electrical engineers, the two are not the same… You are having more energy engineers and less electrical technical engineers."

Fragmentation of collaboration and stakeholders, specifically:

- **stakeholders operate in silos rather than as an interconnected system:** interviewees frequently describe fragmented ways of working between professions and within organizations.

- **task-based focus limits cross-role coordination:** professionals, particularly in construction-related contexts, are described as concentrating narrowly on their own responsibilities, with limited attention to how their work connects to others.

  "Everybody is focused on their own tasks and they don't care about other tasks."

- **commercial interests constrain system-wide perspectives:** maintaining a broader system view is described as difficult where individual or organizational commercial incentives dominate.

  *"The system perspective is very difficult to keep on the agenda because everybody has an interest… You only want to sell your ****."*

- **organizational silos exist within public institutions:** departments within organizations such as RVO are described as operating separately, including in relation to subsidy structures and funding mechanisms.

  "Yeah, we have silos… It's not so that other departments have the same subsidy."

- **regional collaboration opportunities are not always visible:** even when actors are geographically close, interviewees describe limited awareness of potential partnerships or joint initiatives.

  "They know each other, but they didn't know the possibilities of working together."

Fragmentation by company size and regulatory pressure, specifically:

- **regulatory exposure differs by company size:** interviewees describe differences in how regulatory requirements affect large, medium-sized, and small firms.

- **large firms absorb compliance costs through scale:** larger companies are described as managing regulatory and compliance requirements through internal resources, dedicated teams, or acquisition strategies.

  "The bigger companies are getting bigger and they buy the medium businesses…"

- **small firms face lower regulatory exposure:** smaller companies may fall below regulatory thresholds or enforcement intensity due to their size, turnover, or project scope.

  "Smaller companies are able to go underneath the radar…"

- **'going under the radar' reflects reduced oversight:** in this context, interviewees use the term to describe limited exposure to regulatory oversight, reporting requirements, or enforcement.

- **medium-sized firms face full compliance without scale advantages:** medium-sized companies are described as being fully subject to regulatory requirements while lacking the scale or internal capacity of larger firms to absorb associated costs.

  "But the middle bit companies, they have to pay it, but it's costing them margins."

- **market structure reflects firm-size polarization:** interviewees describe a market structure in which large and small firms are more prevalent, with fewer medium-sized companies remaining.

This gap is further intensified by two systemic pressures. First, grid congestion increasingly limits the pace at which electrification solutions can be deployed. Second, the sector faces a growing shortage of technically qualified personnel, particularly those with strong electrical engineering fundamentals. Interviewees describe a fundamental shortage of people in the workforce, creating a situation in which **multiple sectors compete for the same limited pool of talent**.

Competition for talent and workforce dynamics are shaped by overlapping recruitment demands, sectoral pull, and changing workforce expectations, specifically:

- **multiple sectors draw from the same talent pool:** interviewees describe concurrent recruitment across sectors such as energy, health, and education, all targeting a similar group of qualified individuals.

  "Everyone is fishing in the same boat… everybody is more or less coming for the same… qualified people."

- **talent is absorbed by large technology firms:** even when students graduate with technical degrees, many are described as entering large technology companies rather than applied or installation-focused roles.

  "If you finish university… you go to ASML… Philips… You're not working at an installer."

- **availability of hands-on technical workers is reduced:** this dynamic is described as limiting the number of technically trained individuals entering sectors that rely on practical implementation and installation work.

- **workforce expectations are shifting:** interviewees point to broader cultural changes, particularly among younger generations, toward prioritizing work–life balance and stable quality of life.

- **high turnover affects workforce continuity:** employees are described as frequently leaving roles after relatively short periods, often one to two years, contributing to ongoing workforce churn.

Across interviews, stakeholders expressed a shared concern that conceptual discussions on systems integration are not yet matched by operational practice. In practical terms, innovation is advancing faster than the workforce can absorb, apply, and maintain it safely at scale.

This gap is reinforced by the way standards and technical frameworks are developed. Henry Lootens, reflecting on the Dutch approach of "learning by doing," described how engineering concepts developed at the desk often fail when applied to physical infrastructure. Using public lighting projects as an example, he explained that ideas which appeared sound in PowerPoint proved unworkable in real-world conditions, requiring standards to be rewritten only after failures in the field. This dynamic reveals a broken feedback loop in which standards are shaped primarily by theoretical expertise rather than lived, on-site experience. As a result, cognitive complexity accumulates at the desk while practical work is progressively simplified, leading to a situation where those responsible for implementation lack a deep understanding of what they are installing and maintaining. This further weakens the system's capacity to translate innovation into reliable, scalable practice.

Within this context, the Netherlands serves as a critical case for P4ELECS, illustrating the importance of strengthening the interface between innovation, education, and implementation.

1.2 Values and Opportunities

Despite the challenges identified, the Dutch ecosystem exhibits several enabling conditions that create opportunities for targeted intervention through P4ELECS.

1.2.1 Policy Pragmatism and Incremental Transition

Public authorities, particularly within the Netherlands Enterprise Agency (RVO), demonstrate a pragmatic orientation toward the energy transition. There is a visible shift away from rigid interpretations of "100 percent fossil-free" solutions toward hybrid and transitional approaches that prioritize speed and cumulative impact.

This orientation supports modular, stepwise approaches to skills development and lifelong learning, aligned with the P4ELECS building-block model.

1.2.2 Demand for Knowledge Translation and Standardization

Stakeholders consistently emphasized the need to convert experimental and fragmented innovation outputs into stable, accessible formats such as standards, guidelines, and training modules. There is strong recognition that innovation alone does not lead to impact unless it is translated into practical and teachable knowledge.

1.2.3Availability of Real-World Test Environments

The Netherlands benefits from applied testing environments such as The Green Village at TU Delft. These facilities allow technologies and training approaches to be validated under real-life conditions before large-scale deployment, reducing risk for both industry and educators.

1.3 Roles Within the Ecosystem

The Dutch electrification ecosystem is characterized by clearly differentiated stakeholder roles. Each actor contributes to specific parts of the system, yet no single mechanism ensures alignment across innovation, education, and implementation.

As it stands:

- No actor owns cross-system alignment
- No mandate spans innovation, standardization, education, and deployment
- Coordination depends on goodwill, informal networks, or temporary projects

Instead, each actor optimizes for their own function:

- Policy focuses on funding logic and momentum
- Knowledge institutions focus on codification post TRL 9
- Grid operators articulate demand but cannot steer education
- Industry focuses on economic pressure rather than skills design
- Field labs test innovation but sit outside formal training systems

Therefore, alignment is assumed, not governed:

- Quotes like *"Nobody thinks about how innovation lands in organisations or education"* directly point to a systemic blind spot.
- Coordination only happens when **someone actively curates it**, not because the system structurally ensures it.

Policy Enabler

Redefines the role of the public funding agency from a gatekeeper of "perfect" green solutions to an enabler of pragmatic momentum.

“The ecosystem must focus on integrating smaller, imperfect, but immediately available "building blocks".

“Sometimes perfect is the enemy of good”

This perspective suggests the skills ecosystem should not focus solely on training for the ultimate future state (2040), but must urgently provide flexible, modular skills that enable technicians to install and manage intermediate, deployable solutions such as hybrid heat pumps, cable pooling arrangements, and smart energy management systems that allow electrification to progress despite current grid congestion and infrastructure constraints.

Knowledge Codifier

It operates at the interface between innovation and application, translating mature technologies into standards and guidelines for market and educational use.

“When things are liquid knowledge, it’s new and innovative. After TRL 9, that’s where guidelines need to be made.”

He also highlighted a structural failure in the system:

“Nobody thinks about how innovation lands in organisations or education. That is a systemic failure.”

Grid Operator / Demand Side

Grid operators articulate clear technical skill requirements linked to system reliability and safety, yet have limited influence over education timelines and curricula.

“We focus on energy broadly, but what we need are electrical engineers.”

This mismatch contributes directly to implementation constraints.

Industry Advocate

It represents installers and service providers, with a particular focus on the pressures faced by SMEs.

“They feel it in their margins.”

Regulatory and compliance demands disproportionately affect mid-sized companies, limiting their capacity to invest in training.

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Interview evidence shows that regulatory pressure impacts companies unevenly depending on size, placing mid-sized firms in a structurally constrained position. They explain that the market is increasingly polarizing because the “middle segment” cannot absorb regulatory burden in the same way as large firms or avoid it in the way smaller firms sometimes can. Large companies typically respond to new regulations by hiring additional compliance or quality management staff and treating these costs as part of doing business. Small companies may remain below the threshold of strict enforcement. Mid-sized companies, particularly those with 35–70 FTEs, must fully comply but experience compliance costs directly as reduced margins.

These compliance costs limit financial flexibility. Veldman notes that money spent on meeting regulatory requirements competes directly with investments in staff training, skills development, and innovation. He also observes that sustained regulatory pressure influences ownership decisions, with some mid-sized business owners choosing to sell to larger companies because they cannot manage the growing volume and complexity of rules.

Operational capacity further constrains investment in training. Mid-sized companies face the same regulatory and administrative obligations as large firms but typically lack dedicated HR or IT staff to manage them. In companies with 35–70 FTEs, these responsibilities fall largely on owners or managers, increasing workload and reducing available time and resources for training activities.

Financial barriers extend to innovation and skills testing. Testing new technologies can cost around €50,000. While such costs are manageable for large companies, small and mid-sized firms often lack the financial capacity to participate without subsidies.

At a system level, it was highlighted that SMEs struggle to keep pace with the volume and speed of new developments, including the need to train staff across many emerging technologies simultaneously.

Technical Connector

Technical experts emphasize safety, system integrity, and the risks associated with superficial training.

“Installations are being done by people who don’t even read the manual. It has to be safe and doable by design.”

He also noted a broader disconnect between theory and practice:

“We talk a lot about system thinking in the Netherlands, but actually nobody does it.”

Ecosystem Builder

It operates as an **active intermediary** in the energy transition, focused on bridging the gap between innovation and scaling. Rather than functioning as a passive network, it deliberately constructs value chains and manages relationships so that innovations reach the market.

Their work is structured around three core pillars:

- **Physical meeting spaces**
  It provides physical environments where stakeholders meet, based on the premise that collaboration requires repeated, in-person interaction.

- **Shared facilities through an "owner" model**
  Instead of building and owning labs themselves, It identifies a concrete need (such as testing equipment), finds the market party that benefits most from owning the asset, helps secure subsidies to finance it, and establishes a business model that allows other parties to access the facility. This ensures infrastructure is both financed and used.

- **Long-term innovation programmes and funding (3–5 year horizon)**
  Their programmes are oriented toward market needs several years ahead, such as infrastructure requirements linked to future grid targets, ensuring that innovation remains aligned with upcoming demand rather than short-term experimentation and that funding supports coordination.

Beyond these pillars, It plays an **active mediation role**:

- They use a "client of the client" strategy to generate engagement and clarify market demand. To bring technology suppliers to the table, It invites the end users of those technologies. When companies such as Ahold or DHL are present, original equipment manufacturers like Volvo or Mercedes, as well as charging infrastructure providers, are motivated to participate. Hearing directly from these major customers allows suppliers to understand what is actually being asked of them in the market. When end users articulate their operational needs, suppliers recognize that adapting their products and services to meet these requirements creates added value for their clients. This direct exposure to future customer demand motivates suppliers to engage and align their development efforts accordingly.

- They remain involved throughout collaborations, including managing situations where partnerships break down, ensuring that relationships remain usable within the ecosystem.

- They build trust through recurring, challenge-specific communities where stakeholders meet regularly, enabling coalitions to form over time and compete for major European tenders.

Finally, It also **validates market demand for education**. They develop masterclasses to demonstrate that specific skills are needed by industry, then hand these validated concepts over to universities to scale into formal programmes, reducing the risk for educational institutions.

It facilitates collaboration and trust across the ecosystem through neutral coordination and shared infrastructure.

"They knew each other, but they didn't know the possibilities of working together."

This role demonstrates the importance of active mediation rather than passive networking.

Field Lab Operator

Field labs provide regulatory-free environments for testing innovations with real users.

“People test prototypes and learn what works and what doesn’t when real users are involved.”

However, these environments remain weakly connected to structured vocational training pathways.

1.4 Ecosystem Needs

Across interviews, several shared needs emerged that are directly relevant to P4ELECS.

- A clearer and faster pathway for translating innovation outputs into training content
- Modular, practical training that can be deployed quickly in response to industry demand
- Stronger reinforcement of electrical engineering fundamentals alongside emerging technologies
- Dedicated coordination roles to connect education providers, SMEs, and industry
- Greater alignment between funding for innovation and funding for workforce readiness

These needs point to gaps not in knowledge creation, but in knowledge transfer and application.

1.5 Ecosystem Challenges

Four structural challenges consistently limit progress in the Dutch ecosystem.

■ Absence of Clear Ownership

Cross-sector challenges such as skills shortages and grid congestion lack a single actor with both mandate and financial capacity.

“There’s not really a problem owner.” — Henry Lootens

Based on the interviews:

- **Sectors are optimized for isolation, not integration**
  Within sectors, systems tend to produce highly specialized roles rather than integrators. University experts can be extremely knowledgeable within narrow domains, yet struggle to connect their expertise to adjacent technologies or systems. Within the installation sector, work is increasingly simplified to cope with labor shortages, leading to imitation based execution rather than deeper understanding.

- **Internal systems are misaligned with market speed and needs**
  Even when sectors operate as designed, their internal rhythms do not match the pace required by the energy transition. **E**ducation systems typically operate on multi year development cycles, while market demand

evolves within months. Other add that graduates often lack the practical electrical foundations required by grid operators, forcing companies to compensate through internal training.

- **No ownership of cross cutting problems**
  Problems that sit between sectors often have no clear owner. Some describe a pattern of responsibility being passed along without resolution, with issues addressed only after failures occur. Other reinforce this by pointing to a systemic gap between innovation and implementation, where new technologies are developed but not absorbed by SMEs, with no actor responsible for managing that transition.

- **Internal fragmentation within sectors**
  The interviews also show that sectors are not cohesive units. Someone notes that even within a single organization, different teams may duplicate work unknowingly. Other highlight internal strain within the business sector itself, where mid-sized companies are squeezed between large firms and small players.

■ Imbalance Between Innovation and Implementation

Public funding prioritizes technology development over deployment and workforce training.

“Nobody thinks about allocating one to five percent of innovation funding to training.”

■ Decline of Electrical Engineering Fundamentals

Broad energy-focused education pathways dilute essential technical depth.

“We have more energy engineers and fewer electrical technical engineers

■ SME Capacity Constraints

Regulatory and compliance frameworks disproportionately affect mid-sized companies, limiting their ability to invest in skills development.

2.1 Opportunities for the Netherlands from P4ELECS

The Dutch electrification ecosystem highlights a clear opportunity for P4ELECS to deliver value beyond training provision, by strengthening how skills are developed, coordinated, and sustained across levels.

At the **local level**, installers, SMEs, and field labs are actively engaging with DC technologies, but lack fast, flexible pathways to acquire the specific skills needed for safe and effective implementation. This creates a strong case for P4ELECS to deploy **modular “building blocks”** that respond directly to real-time demand, supporting reskilling and upskilling without reliance on long, rigid education pathways.

At the **regional level**, the Netherlands shows that collaboration is possible but not structurally embedded. Ecosystem actors know each other, yet coordination relies on informal relationships and project-based facilitation. Here, P4ELECS can play a critical role in **co-creating sustainable skills ecosystems** by strengthening governance arrangements, supporting neutral coordination roles, and improving alignment between employers, training providers, and research actors. This directly supports the project’s objective to connect demand and supply within the skills ecosystem.

At the **national level**, innovation and policy frameworks are strong, but the transfer of research into training remains slow and inconsistent. The Netherlands case illustrates the need for a structured **research-to-training pipeline**, particularly through stronger collaboration between Higher Education and VET providers. P4ELECS' focus on the **VET–Higher Education handshake** positions the project to address this gap by ensuring that innovations in DC technology are translated into training content across EQF levels 3 to 7.

As the Dutch thematic hub for **DC technology**, the Netherlands offers a valuable testing ground for P4ELECS' broader ambitions. By piloting flexible learning building blocks, platform-based knowledge sharing, and ecosystem governance mechanisms in this context, P4ELECS can generate transferable models for other regions and thematic areas within the project.

In summary, the Netherlands ecosystem demonstrates that the primary challenge is not the absence of innovation, but the absence of structured pathways that connect innovation to workforce readiness. P4ELECS is well positioned to address this challenge by integrating ecosystem development, educational innovation, and thematic specialization, turning existing strengths into scalable and sustainable impact across Europe.

Some quotes:

"Innovation is the problem... not the innovation on itself, but the innovation system is the problem"

"Everything we need to solve world problems is already available... It's all physics... we don't need more innovation. We need skilled people who understand new technology"

"The ecosystem is stuck in a phase of "liquid knowledge" (new, flowing, unstable) that never "coagulates" (becomes standardized, teachable, and structural),. Because no mechanism exists to solidify this knowledge, it flows away when projects end"

"Everyone makes their own foundation, their own website, their Academy... Everybody makes their own niche... they all whine. Nobody comes on our nobody visits our website". This leads to a situation where technicians want to learn but "don't know where they can find the knowledge" because it is dispersed across countless disconnected platforms"

"We talk a lot about. System thinking in the Netherlands, but actually nobody does it. Instead, the mechanism is to "Throw it over the fence," where parties pass responsibility to the next link without ensuring the problem is actually solved"

"Because the knowledge circle is not governed, the innovation never reaches the technician in a usable form"

"There is no playbook because stakeholders are incentivized to focus on the next innovation rather than the boring, difficult work of implementation"