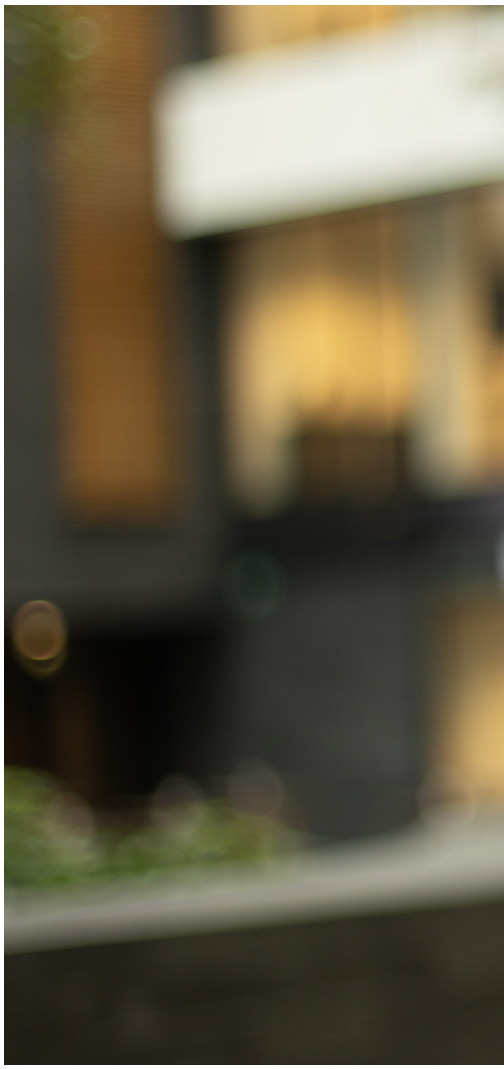
Deloitte. Digital | XR VALLEY

An initiative of Deloitte Digital in collaboration with XR Valley with input from Belgium's XR community

XR IN BELGIUM

Insights into a Growing Ecosystem

Our Content.



Welcome.

Extended Reality (XR) is becoming a key part of how we work, learn, and innovate across Europe, and Belgium has the potential to play a major role. This report offers insights to guide policymakers, businesses, and innovators in **strengthening Belgium's position in the European XR landscape.**

Foreword

The field of Extended Reality (XR) is no longer a distant frontier, it is an active part of how we work, learn, collaborate, and innovate.

Across Europe, immersive technologies are becoming integrated into everyday practice, from industrial simulation and surgical training to cultural storytelling and virtual design. In this rapidly evolving context, Belgium has the opportunity to play a meaningful role.

To better understand the state of XR in Belgium, Deloitte Digital, an active player in digital innovation, joined forces with XR Valley, Belgium's XR ecosystem hub. **Together, we set out to map the sector, hear directly from the organizations shaping it, and identify what is needed to support its growth.**

This report is the result of that collaboration. Drawing on input from over 250 identified XR actors, and survey responses from a sample of this dataset, it provides a comprehensive snapshot of the technologies in use, the people behind them, the sectors being served, and the challenges that remain.

More than a report...

This is a sector-wide conversation starter, a tool for policymakers, businesses, investors, educators, and creators to better understand how immersive technologies are taking root in Belgium, and how they can be supported to grow.

We hope this work contributes to a stronger, more connected XR ecosystem and helps position Belgium as a collaborative and competitive player in the European immersive landscape.

Thomas Kubski

Director Digital Strategy & Immersive Experience at Deloitte Digital

Belgium XR Report supervisor

From vision To reality.

The Evolution of Belgium's XR Ecosystem

When I wrote in 2018 that "XR is only the beginning and we're finally on our way" I couldn't have imagined how rapidly that journey would accelerate.

Back then, I saw remarkable talent scattered across Belgium—in universities, startups, and established companies—all exploring extended reality with genuine passion and creativity. Yet despite their individual brilliance, these efforts lacked the cohesive momentum needed to put Belgium firmly on the global XR map.

This observation sparked XR Valley—a vision to unite these scattered initiatives under a globally recognized banner, building not just a community but a thriving ecosystem. We began with clear principles: to operate independently without government funding, to deliver real value to our members, and to boost other initiatives rather than compete with them.

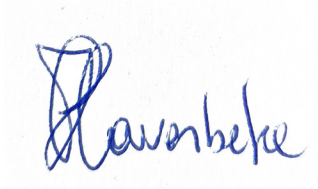
Today, this ecosystem report with Deloitte represents more than numbers and analysis—it's concrete proof that our approach works. XR Valley has transformed from an ambitious concept into a real force driving Belgium's position in the global XR landscape.

Our success in creating a brand with growing international recognition, including work on the board of Stereopsia, now bringing us United XR Europe, and ongoing efforts to connect researchers, businesses, and innovators nationwide has transformed Belgium's XR landscape from fragmented initiatives into a more cohesive ecosystem. Though challenges persist—especially in balancing support for individual events while respecting organizers' independence—we've built a lean, effective organization that understands its role within the broader ecosystem.

Looking forward, our direction is straightforward: we'll streamline our internal operations to focus less on content creation and more on drawing global attention and opportunities to Belgium. Our country should be a place where XR innovators conceptualize, prototype, and find their market fit before taking their solutions worldwide.

This report isn't just a snapshot of our ecosystem—it's an invitation. If you're developing XR technologies, our valley welcomes you. If you're connecting builders, we want to amplify your work. If you're looking for solutions, visit us at least once a year—perhaps at United XR Europe.

Belgium's XR story continues to unfold, with its most compelling chapters yet to come. This ecosystem report isn't merely a record of our progress—it's our collaborative roadmap for the future we're building together.



Cederik Haverbeke

Managing Director at XR Valley

Belgium XR Report Co-Coordinator

Executive Summary

This report is based on a survey performed in 2025 over the main 65 XR actors in Belgium.

The findings reveal a landscape that is both technically mature and strategically positioned for expansion, yet still in need of targeted support to scale effectively. This initiative of Deloitte Digital, in collaboration with XR Valley, is aimed at better understanding the current state of XR in Belgium and defining what is needed to bridge the gap between today's offer and tomorrow's demand.

A Sector in Motion

Belgium's XR sector is composed largely of SMEs (42%) and startups (27%), with the majority operating under B2B business models (45%). Most XR actors entered the field between 2015 and 2020, with a median start year of 2018. While the ecosystem is still relatively young, over half of surveyed organizations generate more than 50% of their total revenue from XR, highlighting the technology's increasing commercial relevance. Regionally, Flanders emerges as the most active hub, representing 69% of respondents, followed by Brussels (20%) and Wallonia (14%). Each region shows distinct strengths: Flanders in industrial and manufacturing use cases, Brussels in creative and public-sector innovation, and Wallonia in training and healthcare.

What the XR sector offers

The XR offering in Belgium is broad and well-developed:

57%
of organizations offer custom software development

48%
provide advisory or consulting services

45%
deliver training solutions

35%
offer software platforms

Most organizations work with Virtual Reality (VR) (86%), Augmented Reality (AR) (79%), and Mixed Reality (MR) (71%), with additional experience in generative AI (86%), digital twins (69%), and metaverse platforms (68%). Popular use cases include training and skills development (88%), product prototyping (71%), simulation and modeling (69%), and remote collaboration (54%).

Organizations with more diverse use cases and technological breadth tend to report higher XR revenues, suggesting a strong link between application scope and commercial performance.

Clients and Market Demand

Belgian XR actors serve a mix of local and international clients. 74% operate both in Belgium and abroad, and 51% expect that at least a quarter of their XR revenue will come from international markets by 2025. Primary client sectors include:

54%
Education & Academia

38% Healthcare & Life Sciences
38% Industry & Manufacturing (38%)
55% Cultural & Creative Industries

Demand is growing, but client expectations are evolving rapidly, particularly around scalability, interoperability, and return on investment.

Talent and Team Structures

55%
have 1 to 5 employees dedicated to XR

28% have 6 to 10 employees
15% have between 11 and 50 employees
2% have more than 250 employees

Developers, project managers, and UX/UI designers are the most common roles in XR organizations. While 40% are currently hiring, nearly 70% plan to recruit within two years, with 35% already sourcing international talent—mainly from Europe. Early adopters are leading this trend, showing stronger growth and deeper global integration.

Support Needs and Policy Implications

Belgian XR actors are strongly aligned in what they need to grow:

- ***Access to funding***
- ***Specialized talent and upskilling***
- ***Increased visibility and public awareness***
- ***Support for R&D and technical infrastructure***

These needs are consistent across regions and organizational types, highlighting systemic gaps that could be addressed through coordinated national and regional strategies.

Belgium has a unique opportunity to position itself as a leading XR hub in Europe but doing so will require action. Policies that support investment, talent development, ecosystem coordination, and public-private collaboration can help close the gap between today's offer and tomorrow's demand.

Introduction

Extended Reality (XR), encompassing Virtual Reality (VR), Augmented Reality (AR), and Mixed Reality (MR), is increasingly recognized as a key enabler of digital transformation across Europe.

No longer limited to gaming or entertainment, XR technologies are finding applications in sectors such as healthcare, advanced manufacturing, education, retail, and cultural heritage. According to Gartner's Emerging Technologies Hype Cycle (2023), spatial computing, including XR, is entering a new stage of adoption, with immersive tools being integrated into real-world business and public service environments.[1]

1 **Sources:** *Statista, XR4Europe*

European market

The European XR market continues to grow, supported by rising investment, R&D activity, and increasing awareness of the potential of immersive technologies.

Insights from Statista show consistent year-on-year growth in XR adoption across European countries, and the European Union is taking steps to support this trajectory. The European Commission's Digital Decade strategy outlines ambitions to strengthen Europe's digital capabilities, including immersive and interactive technologies. Initiatives like XR4Europe are also working to unify the ecosystem by connecting researchers, creators, and companies to accelerate collaboration and visibility across the continent.

Belgium is home to a vibrant and evolving XR ecosystem

Startups, creative studios, research institutions, and digital transformation leaders are contributing to a growing body of work in immersive technology spanning training platforms, virtual collaboration tools, 3D design environments, and cultural content. Yet, like many emerging sectors, Belgian XR faces challenges: talent shortages, limited visibility, fragmented support mechanisms, and uneven access to funding, holding back its potential.

Deloitte digital partner with XR valley

This report was initiated by Deloitte Digital, active in immersive technology and innovation, in collaboration with XR Valley, Belgium's leading XR ecosystem network. Together, they launched this research effort to better understand the state of XR in Belgium, map the organizations active in the field, and explore what is needed to help the sector grow, scale, and connect internationally.

Based on 65 XR organizations

Drawing on data from 65 XR organizations across the country — a representative sample in terms of characteristics, regional representativeness, and other key factors — this report provides a comprehensive look at Belgium's XR landscape, its technological expertise, market applications, talent structure, and future needs. It also offers key insights and policy recommendations aimed at bridging the gap between today's offer and tomorrow's demand.

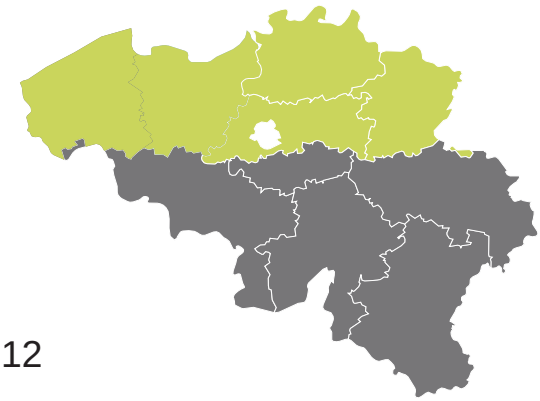
Belgium XR insights

Research Methodology

To better understand the XR landscape in Belgium, a two-step research process was undertaken.

First, an extensive web screening was conducted to map organizations active in XR technologies across the country. This mapping identified 266 organizations, reflecting the diversity of the ecosystem. The organizational landscape consists largely of startups (49%) and SMEs (39%), along with a smaller proportion of large companies (8%), mid-sized companies (4%), and non-profit organizations such as universities, research centers, and training institutes (approximately 11%).

Regional distribution



67% Flanders of XR actors

8% Brussels of XR actors

25% Wallonia of XR actors

The most active sectors include Digital & IT (24%), Creative Industries (11%), and Software Development (9%).

Building on this mapping, an open survey was launched in March 2025

The survey was shared through a social media campaign on LinkedIn and direct invitations to organizations identified in the mapping phase. While the sample includes 65 organizations, representing almost 25% of the mapped ecosystem, by number, but representing about 85% by turnover across key dimensions such as sector focus, region, and organization size.

The survey respondents proportionally reflect the broader ecosystem's structure, capturing the diversity of actors:

52%
in education

Respondents operate across diverse sectors, with notable activity in education and academia (54%), training and skills development (43%), entertainment and media (42%), healthcare and life sciences (39%), and industrial and manufacturing applications (39%).

42%
of SME's

SMEs make up 42% of the respondents, startups account for 26%, and about 15% are non-profit entities (such as educational and research institutions).

69%
from Flanders

In terms of geography, the distribution closely follows national patterns with 69% from Flanders, 21% from Brussels, and 10% from Wallonia.

By combining a full ecosystem mapping with a targeted survey, this methodology offers a comprehensive portrait of Belgium's XR landscape, highlighting an ecosystem characterized by innovation, sectoral diversity, and regional development.

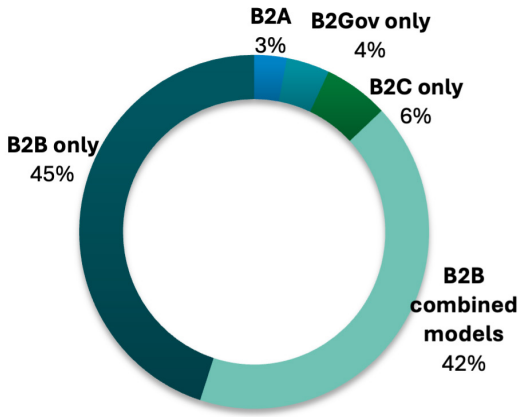
Market Snapshot

Market Insights

The XR landscape in Belgium is steadily evolving, shaped by a mix of dynamic organizations actively exploring immersive technologies. The survey responses analyzed here reflect a meaningful cross-section of that broader landscape, offering insights into the profiles, activities, and trajectories of the sector.

The majority of respondents (about 72%) are private companies, particularly SMEs (42%) and startups (27%), pointing to a sector that is agile, entrepreneurial, and innovation-driven. A smaller share includes research centers (28%), which contribute academic and technical expertise. This diversity reflects a layered ecosystem where commercial innovation and mission-driven experimentation coexist, supported by collaboration between business, research, and creative sectors.

In terms of business models, the XR ecosystem is primarily B2B-focused. 45% of organizations operate exclusively in a business-to-business context, while 42% combine B2B with other models, including services for government (B2Gov), consumers (B2C) or hybrid models (B2B2C). Pure B2C and B2Gov models are relatively rare, representing only 6% and 4% of the respondents, respectively. A small number of organizations (3%) experiment with emerging models like business-to-avatar (B2A). These numbers are also in line with the current European landscape (source) and suggest that XR in Belgium is still largely oriented around professional applications and industrial partnerships.



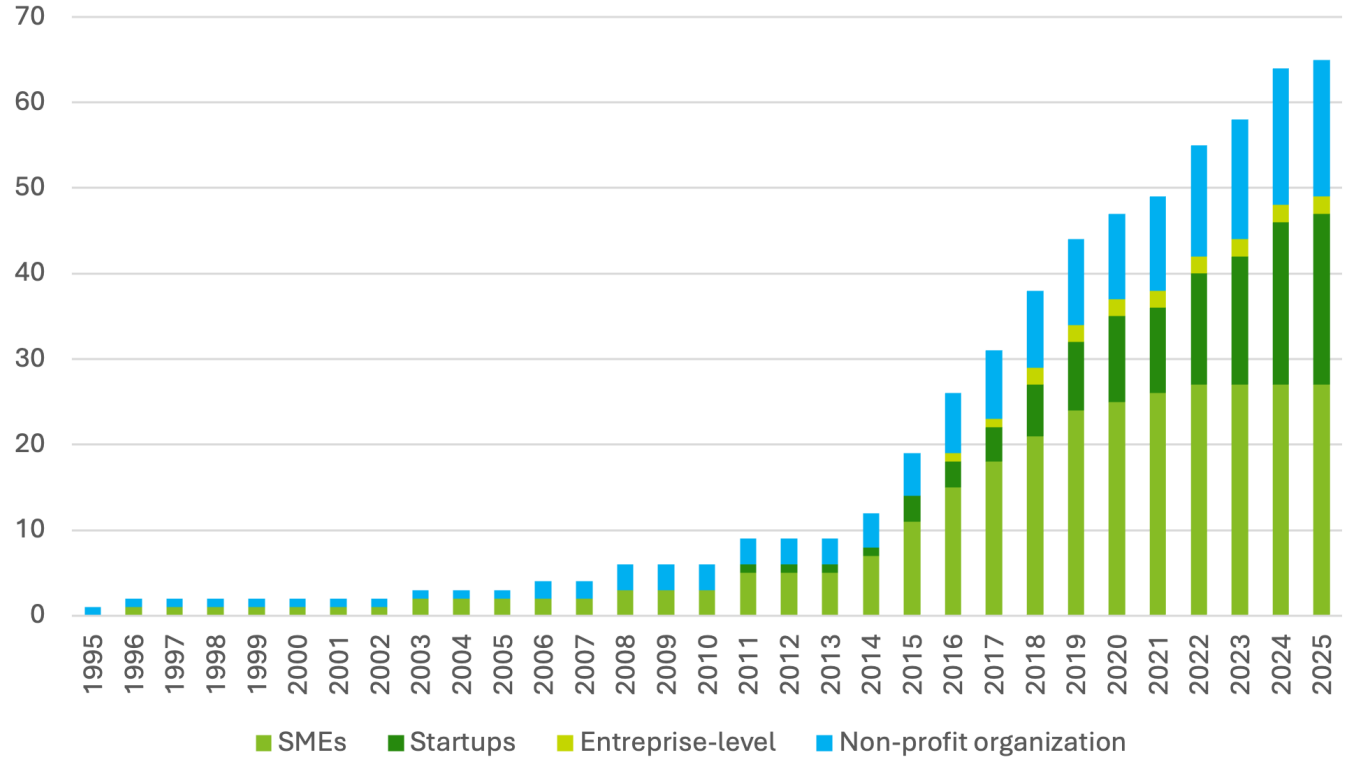
65 Participants in this research

The timeline of XR activity shows a clear pattern of sustained growth over the past decade. Roughly 60% of organizations entered the field between 2015 and 2020, with a median start year of 2018. While a few pioneers were active as early as 1995, the ecosystem has expanded rapidly in recent years +17% new players each year on average.

Belgium's XR market growth mirrors global trends but on a smaller scale. According to Statista and IDC, the global XR market is expected to reach 150 billion by 2025, driven by VR/AR headsets (e.g., Meta Quest, Apple Vision Pro), the metaverse, Industry 4.0, and medical applications. The CAGR is estimated at 24% to 31%.

In Belgium, initiatives such as European support and digital hubs aim to boost immersive technologies.

Estimates indicate that the Belgian XR market is expected to grow by the end of 2025. Key sectors include health, architecture, museography, and technical training, with a focus on education. The annual growth rate is about 15-20%, slightly below the global average but steadily progressing.[1]



60%

New players between 2015 and 2020

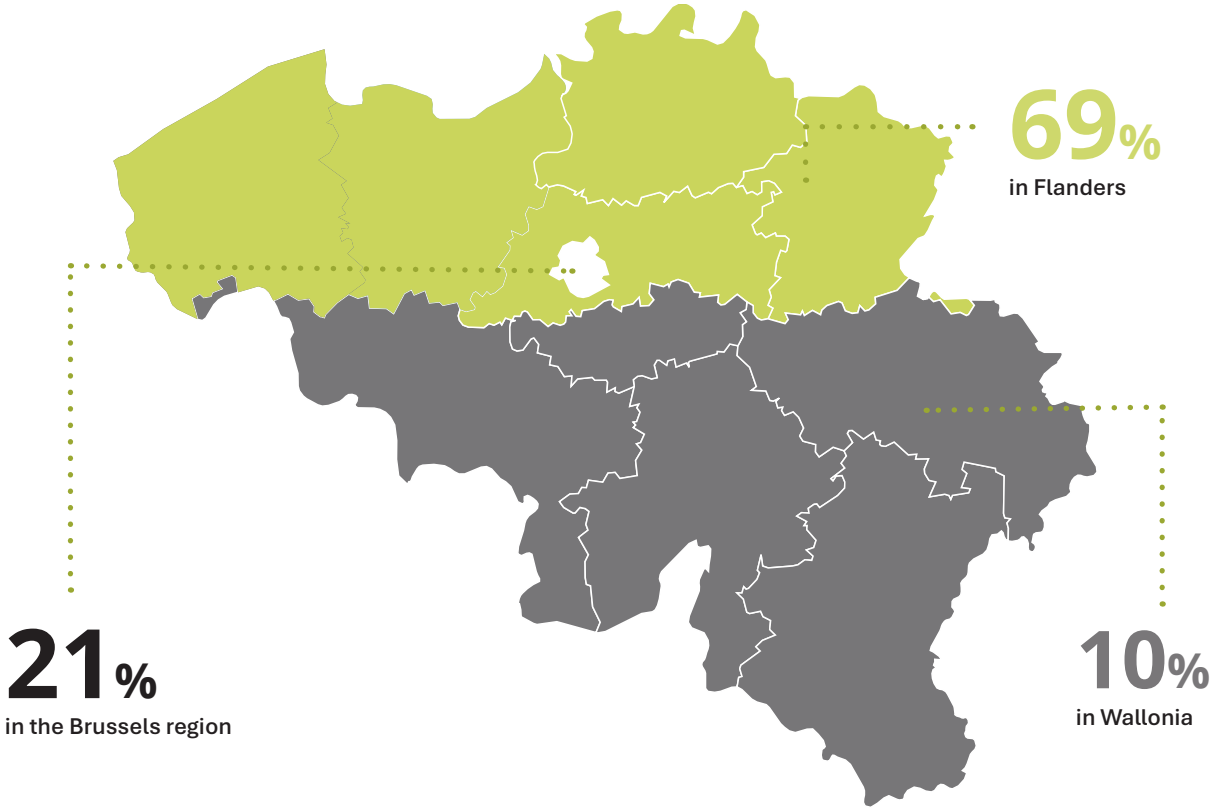
+17%

New players each year on average

29%

of the players have been in existence for more than 10 years

1 **Sources:** *Statista, IDC, Agoria, WBI, XR4Europe*



Geographically, the survey sample captures XR organizations from all three regions of Belgium, with a clear concentration in Flanders and Brussels.

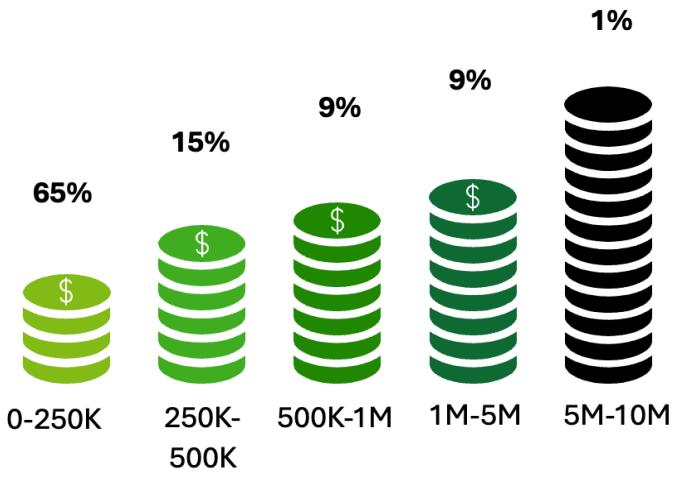
Flanders stands out as the main hub, hosting the largest number of XR actors across organization types, including a strong presence of SMEs, start-ups, and research institutions. Brussels shows a more entrepreneurial and diverse profile, with a notable share of start-ups and SMEs, alongside other organization types. Wallonia is less represented in the dataset but nonetheless features active XR organizations, primarily SMEs and select research and innovation actors. It is important to note that this regional distribution reflects only the organizaUN tions that participated in the survey and may not fully represent the entire Belgian XR ecosystem.

Revenue levels across the sector show a wide range of maturity and business scale.

Revenue levels across the sector show a wide range of maturity and business scale. While 52% of organizations (excluding non-profit organizations) report that XR generates more than 75% of their revenue, highlighting a high degree of specialization, 26% generate less than 25% of their income from XR. The remaining organizations fall in between: 14% derive between 25% and 50% of their sales from XR, and 8% report that XR accounts for 51%–75% of their business. These figures illustrate that for many actors, XR is a core business driver, while for others, it remains a growing or supplementary activity within a broader offering.

Taken together, these figures indicate that 60% of surveyed organizations can be considered pure players in the XR sector, providing dedicated services with XR representing their core revenue stream (+50%) and primary business focus.

Among the organizations that responded to the survey (excluding the non-profit organizations), 60% of total XR revenue comes from Flanders, 24% from Wallonia, and 10% from Brussels. These figures confirm Flanders' economic dominance in the XR sector. SMEs alone generate over 75% of this revenue, compared to around 8% for startups. This data highlights the structuring of a market around established and specialized players. Notably, Wallonia—though less represented in the sample—generates a larger share of XR revenue than Brussels, suggesting the presence of strong regional actors active in specific industrial or institutional niches.



Revenue growth expectation for XR solutions	
1-10% (60%) +10% (29%)	2025
1-10% (72%) +10% (58%)	2030

Global relevance in the immersive technology space.

Overall, Belgium's XR sector presents a promising mix of entrepreneurship, academic involvement, and industry application, backed by increasing activity across regions and sectors. The field is still relatively young but growing steadily, laying strong foundations for innovation, collaboration, and global relevance in the immersive technology space.

Typical XR actors profiles in Belgium

The results of the survey allowed to depict some regional specificities:

BrusselsRegion

The typical XR actor in the Brussels Region is a small organization or early-stage startup, employing between 1 and 5 people in dedicated XR roles, often complemented by freelance collaborators. These teams are multidisciplinary, covering technical, creative, and strategic functions. Organizations here often operate across B2B, B2Gov, and B2C models, serving both commercial clients and public institutions. Most entered the XR space between 2018 and 2022, reflecting a newer wave of adoption.

Brussels-based XR organizations tend to earn less than 50% of their revenue from XR activities, with XR representing either a growing business line or an experimental domain within a broader offer. About 65% of Brussels respondents export services abroad, primarily across Europe, thanks to proximity to international institutions and creative hubs.

Brussels represents 21% of the total dataset. XR actors in this region are especially prominent in serving the events and cultural sector, followed by healthcare, education, real estate, and the public sector. Organizations here are more likely to work at the intersection of technology, creativity, and civic engagement, reflecting the region's mix of international institutions, cultural networks, and innovation labs.

Flanders Region

The typical XR actor in Flanders is a private company, most often an SME or startup, operating in a B2B model. Teams typically comprise 5 to 10 XR employees, supported by broader company resources and occasional external collaborations for specialized development tasks. Most organizations in this region began working with XR between 2017 and 2018, positioning Flanders as an early adopter of immersive technologies.

A majority of XR companies in Flanders derive over 75% of their revenue from XR activities, underscoring the region's specialization and business maturity. About 72% of Flanders respondents export XR services abroad, reflecting international integration within European industrial and technological networks.

Flanders is by far the most active region in Belgium's XR ecosystem, representing 69% of all survey respondents. XR actors in Flanders are especially involved in industrial and manufacturing use cases, as well as in healthcare and life sciences, cultural and event experiences, education and training, and AEC. The region's XR activity aligns closely with its industrial innovation clusters and R&D infrastructure, with many companies integrating XR into existing service portfolios or sectoral value chains.

Walloon Region

The typical XR actor in Wallonia is an SME that began XR activities in 2018 or later, often serving a niche within B2B or B2Gov markets. Teams are generally small, with 1 to 5 XR employees, and a stronger reliance on outsourcing or external partnerships for technical development and content creation. There's a clear interest in building internal capacity through training and recruitment initiatives.

XR represents less than 50% of revenue for most Walloon organizations, suggesting XR is often part of a broader service mix. Only 40% of Wallonia respondents export XR services abroad, reflecting a stronger local or regional market focus.

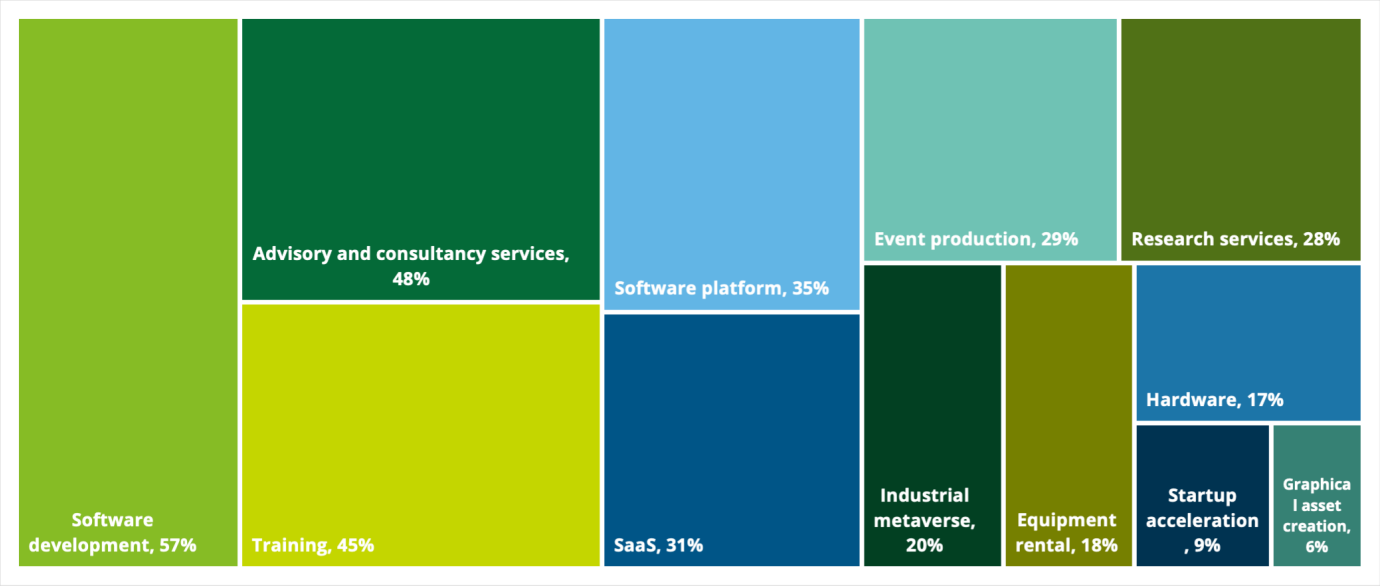
Wallonia accounts for 10% of the respondents in the dataset. XR organizations are mainly active in healthcare, industrial/manufacturing, and public sector services, with additional activities in education, culture and heritage, and entertainment. Use cases often involve simulation, training, and educational content, aligned with the region's economic priorities and institutional structures.

These profiles are based on survey respondents and reflect only the organizations that provided data. They offer a partial but valuable view of regional XR dynamics, capturing differences in business models, organizational capacity, international reach, and sector focus across Belgium.

Business insights

Description of the offer

The Belgian XR sector offers a diverse and professionally mature range of solutions, with many organizations combining technical development, consulting, and applied services. The most commonly provided solutions include custom software development, cited by 57% of respondents, followed by advisory and consultancy services (48%), training applications (45%), and the creation of software platforms (35%). A growing share (31%) also offer XR as a SaaS model, reflecting the shift toward scalable, cloud-based delivery.



This blend of product-based and service-based offerings indicates that XR providers are equipped to guide clients through the entire lifecycle of immersive solutions from early-stage exploration and prototyping to deployment, scaling, and maintenance.

The presence of both consulting services and platform solutions suggests that Belgian XR actors are positioning themselves not only as developers but also as strategic partners.

The types of solutions offered vary across organization types. Companies tend to focus on software development, SaaS platforms, and client-driven consulting, aligning with market demand. Knowledge institutions, in contrast, emphasize advisory roles, often linked to research collaborations, prototyping, or content co-creation. Meanwhile, non-profits and labs report a broader engagement in consulting and training solutions, often oriented toward public impact, education, or accessibility. These patterns reflect each group's mission and the types of value they provide to clients: commercial, academic, or social.

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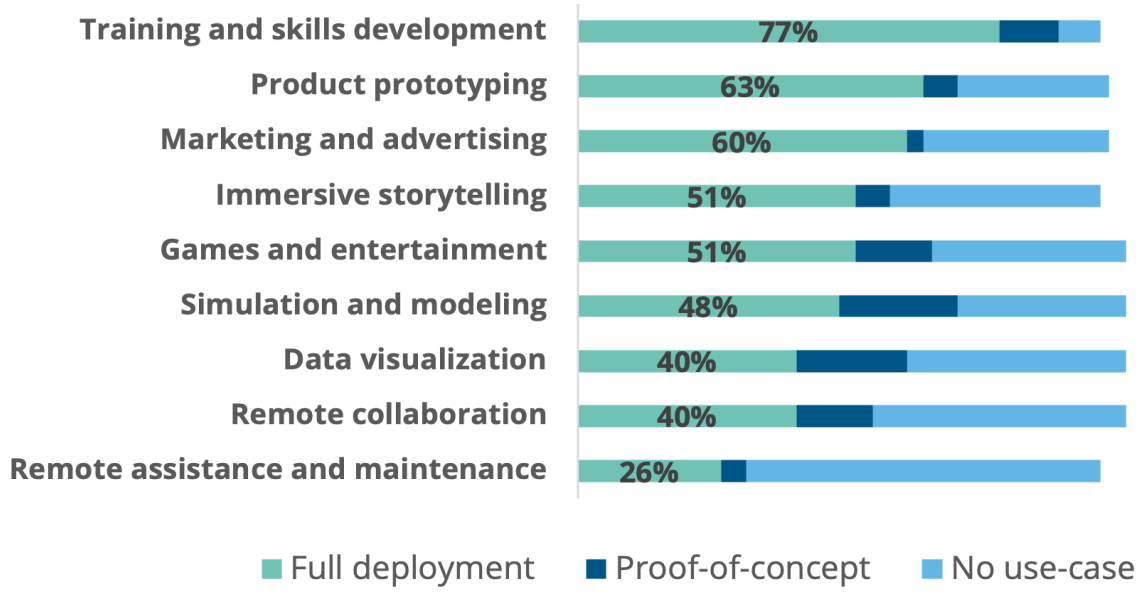
Organizations demonstrate significant experience across a wide range of applied XR use cases. The most mature areas — measured by the number of organizations reporting full deployment— include:

77%
Training and Skills Development
(adopted by 77% of respondents)

60%
Product Prototyping and Marketing & Advertising
(each over 60%)

50%
Simulation & Modeling and Remote Collaboration
(both above 50%)



These use cases reflect XR's versatility across sectors, particularly in operational and enterprise environments. Solutions developed by Belgian XR actors are closely aligned with industries that benefit most from visualization, simulation, and interactive content, notably **healthcare, manufacturing, and education.** They also represent areas of current market demand and are already widely operational and commercialized.

In parallel, the sector shows a **dynamic innovation pipeline.** A significant number of organizations are actively working on emerging applications still under development in the form of POCs. These include Healthcare Simulations, Digital Twins, Industrial XR Solutions, and Metaverse Platforms, indicating where R&D efforts and future commercial opportunities are concentrated.

Technology-wise, the ecosystem is grounded in immersive formats

Technology-wise, the ecosystem is grounded in immersive formats like Virtual Reality (VR), Augmented Reality (AR), and Mixed Reality (MR), used by 86%, 79%, and 71% of respondents, respectively. Many organizations also report experience with Digital Twins (57%), Metaverse platforms (55%), and Generative AI, showing the sector's shift toward intelligent, persistent, and data-driven experiences.

86%

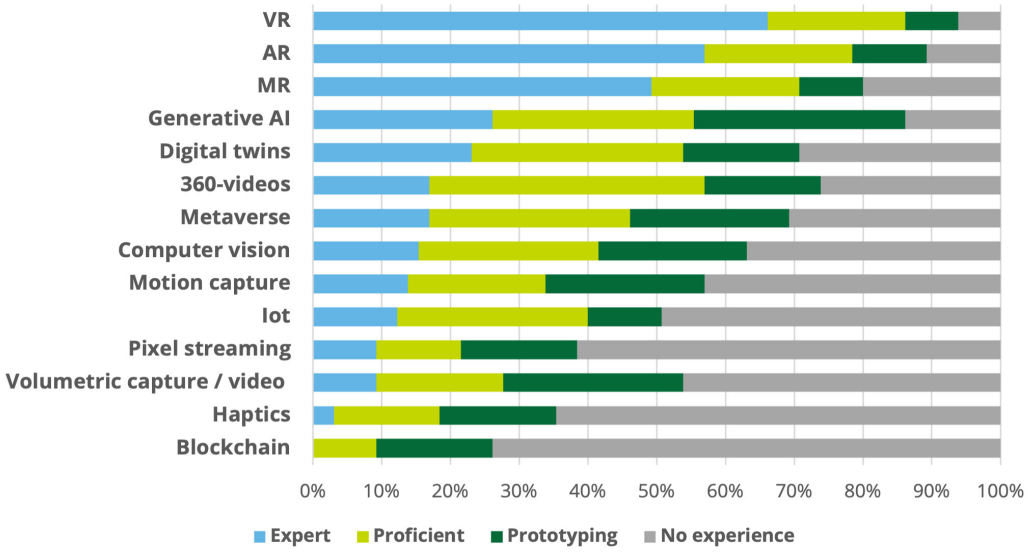
are competent in VR

79%

are competent in AR on average

71%

are competent in MR



Experience levels vary depending on the type of organization. Companies are more active in client-facing applications such as AR, Digital Twins, and Metaverse tools, aligning with commercial and enterprise markets. Research and non-profit organizations tend to focus on VR, Motion Capture, and AI-driven XR, applying these technologies in cultural, educational, and social contexts. These organizations frequently leverage accessible formats such as 360° video or AR to support public engagement, training, and knowledge dissemination.

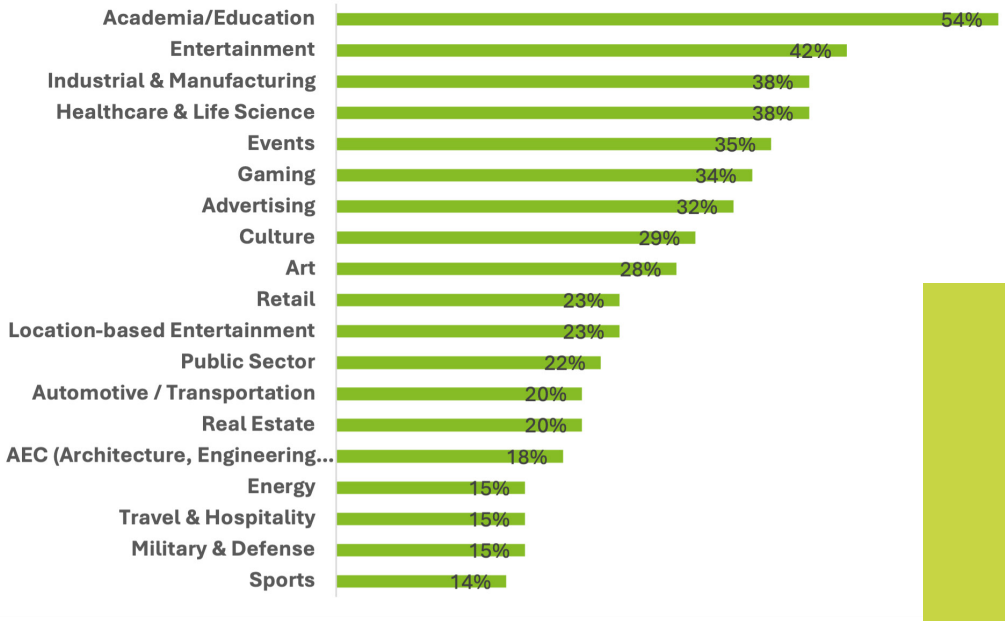
Early adopters (pre-2018) report higher experience across the board, while recent entrants focus on core technologies and are still expanding their portfolios. There is a clear link between diversity of use cases and commercial performance: organizations with higher XR revenues are more likely to work across multiple domains. Use cases such as Remote Collaboration, Simulation & Modeling, and Product Prototyping are especially common among the most commercially successful actors.

In summary, the Belgian XR offer is both technologically robust and strategically diverse, with organizations differentiating based on their sector focus, service orientation, and maturity. This layered ecosystem positions Belgium as a well-rounded XR hub, capable of delivering impact across business, education, and society.

Description of the demand

The demand side of the Belgian XR ecosystem reveals a dynamic and internationally oriented market. XR providers serve a broad range of client sectors, with a particularly strong presence in fields where immersive technologies bring immediate, demonstrable value. The most commonly served sectors include Education and Academia (54%), Entertainment and Media (42%), Healthcare and Life Sciences (39%), and Industrial and Manufacturing (39%). These results highlight how XR is increasingly applied to both people-centered challenges, such as learning and engagement, and process-driven contexts, such as technical operations, healthcare workflows, and factory-floor simulations.

52% Cite training and skills development as a dominant use case



43%
cite training and skills development as a dominant use case

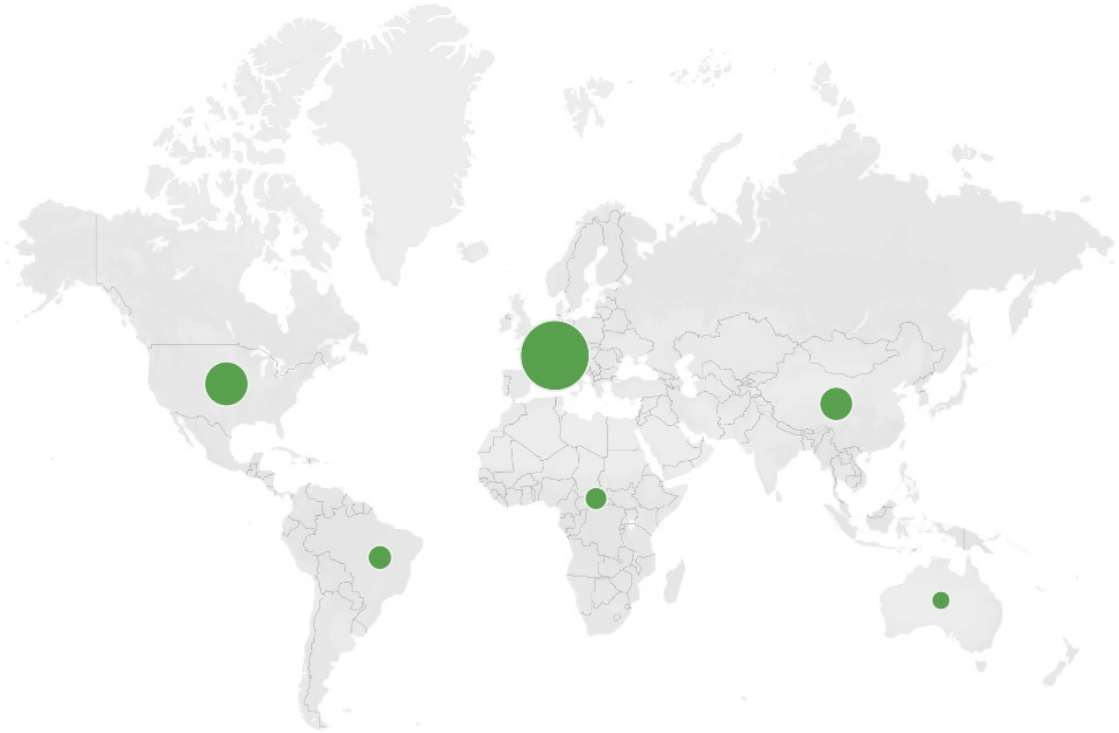
Across these sectors, Training and Skills Development emerges as a dominant use case, cited by 43% of respondents. This application cuts across multiple domains, from surgical training in healthcare to onboarding in industrial environments, demonstrating XR's value in experiential learning, procedural guidance, and safety simulation.

In terms of geography, Belgian XR actors are highly internationalized. A clear majority of organizations (74%) serve clients both within Belgium and abroad, while only 26% operate solely within the national market. Among international clients, Europe dominates (served by 98% of those working abroad), followed by North America (38%) and Asia (21%). This confirms that Belgian XR providers are well embedded in international ecosystems, particularly within the EU and broader Western markets.

26%
operate solely within Belgium

74%
serve customers both in Belgium and abroad

Financially, XR has become a core business driver for many organizations.



50%

more revenues thanks to XR

26%

expect to generate more than 75% of their revenues from abroad

While 22 respondents report that XR generates less than 25% of their overall revenue, a larger group (28) earns more than 75% of their revenue from XR-related services, products, or projects. In total, over half of respondents generate more than 50% of their revenue from XR, indicating that for many, XR is not a side activity but a central commercial pillar.

Notably, higher revenue levels tend to be associated with international client bases. Among organizations earning the most from XR, 100% serve clients beyond Belgium, suggesting that access to foreign markets is a key growth driver. These higher-earning organizations are also more active in sectors like Healthcare, Manufacturing, and Simulation, indicating that commercially successful XR providers are focused on complex, scalable solutions with strong business-to-business value.

Looking ahead, expectations for growth are strongly tied to continued international expansion. More than half of all respondents expect to generate at least 25% of their XR revenue abroad by 2025, with 26% of the organizations projecting that over 75% of their XR income will co me from outside Belgium. These ambitions reinforce the sector's global outlook and its confidence in the exportability of immersive solutions.

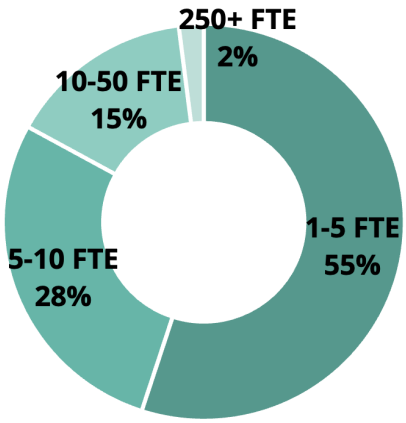
In sum, the demand side of the Belgian XR landscape is characterized by sectoral diversity, global orientation, and growing commercial maturity. XR solutions are being delivered to a wide mix of industries, increasingly tied to mission-critical processes, and backed by strong revenue expectations, particularly for those organizations able to scale internationally and address complex enterprise needs.


“
17 organizations projecting that over 75% of their XR income will come from outside Belgium

Talent insights

35% of companies have already hired abroad

Behind the growing XR sector in Belgium is a network of compact, highly specialized teams combining creative, technical, and strategic expertise. Most organizations operate with small, dedicated teams focused on immersive projects: 55% report having 1 to 5 employees working specifically on XR, and another 28% have 5 to 10 employees. Only a minority of respondents report larger XR teams, with 15% having 10 to 50 employees, and just 1.5% indicating team sizes exceeding 250. These lean structures reflect a sector that is still scaling, with many organizations operating in startup or SME modes.



35%

of companies have already hired abroad, **mainly from Europe (+80%)**

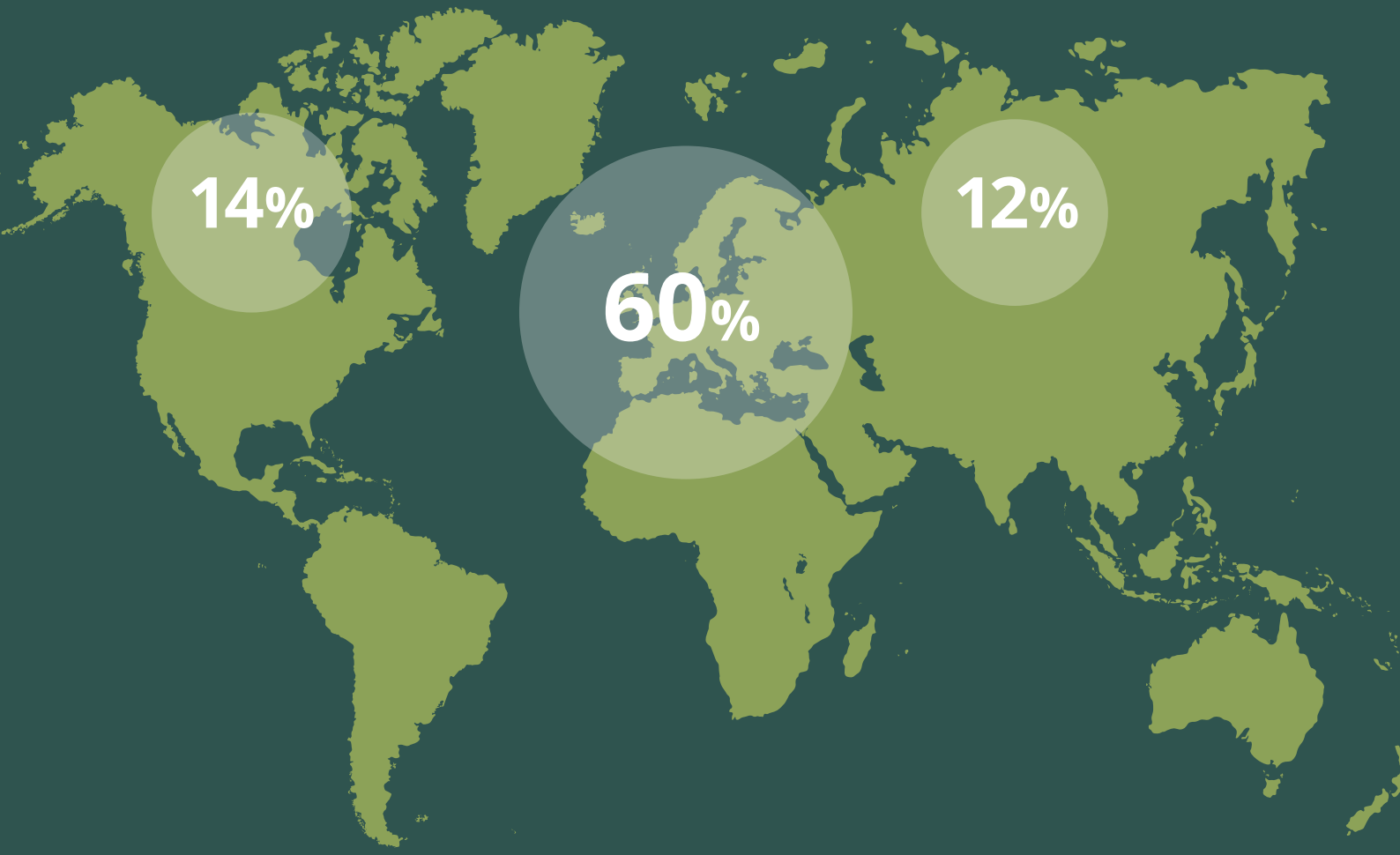
XR teams in Belgium are typically multidisciplinary, combining software development with project management and user-centered design. The most commonly represented roles include software developers (75%), project managers (71%), business developers (69%), and UX/UI designers (59%). This mix underscores how Belgian XR teams are not only building technology but also managing delivery, partnerships, and client relations.

There are also notable differences between types of organizations and stages of maturity. Startups tend to have entered the XR field significantly later than SMEs, suggesting they are part of a newer wave of adoption, while SMEs often represent early adopters who integrated XR into existing services or R&D pipelines over time. These early adopters, defined as those active in XR before 2018, are also more active in talent acquisition: 24% are currently hiring and have already recruited internationally, compared to just 7% of more recent entrants. This suggests they are further along in their growth, with better-defined needs and stronger ties to global talent networks.

In summary, Belgian XR organizations are powered by small but capable and multidimensional teams, supported by outsourcing and increasingly international recruitment. As demand for immersive technologies grows, these teams are expected to expand in size and specialization, forming the backbone of Belgium's evolving XR ecosystem.

Outsourcing capacity

While internal capacity is central, outsourcing is a widespread practice. Only a small number of organizations report managing XR development entirely in-house. **The majority collaborate with external partners,** primarily in Europe (60%), followed by North America (14%) and Asia (12%). This approach allows organizations to scale on demand, access niche skills, and reduce production bottlenecks.



40%

Organizations

Looking ahead, the sector is undergoing steady growth in workforce demand. As of the survey, 40% of organizations were actively hiring for XR-related roles, and 69% foresee hiring in the next two years. This growing demand for XR talent signals a maturing ecosystem, where capabilities must keep pace with both technological and commercial ambitions.

35%

Foreign talent

A notable trend is the growing internationalization of XR recruitment. 35% of respondents have already hired talent from abroad, most frequently from Europe, but also from Asia (9%), North America (8%), and to a lesser extent, South America and Oceania. This points to a sector that is increasingly global in its talent strategies, actively seeking the skills it needs beyond national borders.

Policies insights

organizations share a clear understanding of what is needed to strengthen and grow their activities.

The survey results reveal a consistent message across the XR sector in Belgium: organizations share a clear understanding of what is needed to strengthen and grow their activities. These needs go beyond technical capabilities and point to a combination of strategic, financial, informational, and collaborative support mechanisms that would allow XR initiatives to scale more effectively.

5 **priority areas where targeted support would have the greatest impact:**

Greater public awareness of XR

The most frequently cited need is for better information and awareness around XR technologies. More than 85% of respondents rated this as relevant or very relevant, highlighting the urgency of improving public and sector-specific understanding of XR. Organizations pointed to gaps in how XR is perceived by clients, users, and even decision-makers internally. This reflects clear opportunities: targeted awareness campaigns, educational integration, and public-sector demonstration projects could significantly boost the visibility and credibility of XR solutions.

>85%

better information and awareness around XR technologies

Better networking infrastructure

Networking and access to ROI case studies were each considered relevant or very relevant by approximately 70% of organizations. These responses point to the importance of ecosystem building, creating opportunities for XR actors to share knowledge, build partnerships, and understand the return on investment of immersive solutions. Public support for national XR hubs, sector-specific roundtables, and data-sharing platforms could facilitate this kind of collaborative infrastructure.

70%

networking and access to ROI case studiesand abroad

Increased access to funding

Financial support and access to grants was identified as the second most pressing priority, with nearly 80% of organizations rating it as important. Respondents emphasized the challenges of accessing funding for prototyping, project development, and commercialization. Startups in particular noted difficulties securing resources to move from idea to implementation. This suggests a need for more dedicated funding instruments tailored to immersive technologies, including innovation vouchers, pilot funding, and early-stage acceleration programs.

>80%

Financial support and access to grants

Improved access to skilled XR talent

The picture is more mixed when it comes to XR talent availability. Just over 50% of respondents see this as a relevant issue, while around 40% rate it as not that relevant or irrelevant. This divergence suggests that while some organizations are already well-staffed or rely on outsourcing, others face recruitment challenges. Though not a universal barrier, the emergence of immersive technologies as a growth field justifies proactive investment in XR-specific training, reskilling, and international talent mobility—particularly to support long-term ecosystem capacity.

50%

Talent availibility

More R&D opportunities

R&D opportunities are also a high priority, particularly for knowledge institutions and innovation-driven SMEs. Over 75% of respondents indicated that increased access to research and development partnerships would leverage their XR activities. Here, policymakers can play a key role by supporting public-private collaboration, fostering connections between industry and academia, and anchoring XR within broader regional innovation strategies, especially in high-impact fields such as healthcare, education, and industrial design.

>75%

Increased access to research and development partnerships

These priorities are not only broadly shared, but they also align closely with areas where policy intervention can play a decisive role.

Belgian XR organizations are strategically aligned on the types of support they need. With targeted policy action across funding, awareness, R&D, and talent, Belgium can position itself as a leading European XR hub.

Variation in support needs by type of organization

Analyses revealed that while many support needs are widely shared, there are statistically significant differences in how some priorities are perceived:

The analyses reveal that while many support needs are widely shared among different types of XR organizations in Belgium, there are notable differences in prioritization. Knowledge institutions place a higher emphasis on awareness and financial support, reflecting their focus on education, outreach, and reliance on external funding for research and innovation. Companies, primarily SMEs and startups, prioritize visibility and funding over internal capacity building, whereas non-profits and labs emphasize networking opportunities and collaboration tools. These findings suggest that tailored support mechanisms may be necessary to address the distinct needs of each organization type within the XR ecosystem.

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XR VALLEY

Closing Words.

Bridging the Gap

Today's Offer, Tomorrow's Demand

he Belgian XR sector today presents a strong and diverse offer that it grounded in solid technological expertise, driven by small but highly capable teams, and applied across a wide range of sectors from education to manufacturing, healthcare, and media. Organizations are actively delivering software solutions, consulting services, training applications, and immersive platforms. They are often supported by multidisciplinary teams that combine technical, creative, and strategic roles. The sector is deeply embedded in professional use cases, with clear commercial applications and growing international reach.

Organizations expect to grow their international presence, diversify use cases, increase XR-generated revenue, and hire more talent. Clients increasingly seek intelligent, data-driven, and scalable XR solutions, while the ecosystem still faces constraints in terms of talent availability, investment, and production capacity. Bridging this gap requires targeted support and forward-thinking policies.

If today's offer is to meet tomorrow's demand, Belgium must invest in the right foundations:

- **Talent pipelines must be reinforced through education, reskilling, and international recruitment support.**
- **Access to funding must be made easier, especially for early-stage companies navigating prototyping and go-to-market phases.**
- **R&D collaboration should be strengthened between companies and research institutions to help scale promising ideas into viable products.**
- **Public awareness and procurement can act as market enablers, especially when governments adopt immersive solutions for training, culture, or public services.**

Belgian XR organizations are already strategically aligned in their vision of what they need to grow. Survey results show consistent calls for better access to funding, stronger visibility and awareness, research and innovation support, and access to talent. These needs are shared across regions and organizational types, indicating that policy efforts could have broad and immediate impact.

By closing the gap between today's offer and tomorrow's demand, Belgium has an opportunity to position itself as a leading XR hub in Europe.

This means not only supporting existing players but also creating an environment where the next generation of XR innovators can thrive—through investment, collaboration and visibility.

Voices of the field

XR in Education & Training

Extended reality has become user-friendly, affordable, and versatile, peaking interest from educators and trainers worldwide. This should come as no surprise: many studies have highlighted unprecedented affordances for learning.

In virtual reality learners can travel to remote places, revisit the past or engage in first-hand experiences that are otherwise not possible in real life. Learners are not hindered by any limitations in time, space, equipment or dangers, and can learn in authentic, interactive, and personalised ways. Augmented and mixed reality increase learners' understanding of abstract concepts by the 3D-visualisation and guide them in procedural tasks with on-demand instructions.

Research has shown that these XR technologies can enhance both cognitive (learning performance), and affective outcomes (motivation, interest, satisfaction). Following several meta-analyses, XR technologies have proven to be equally or even more effective than other instructional approaches. Some even call them 'a superior option' not pointing to the learning effects, but to the organizational and economic benefits: less harm, less waste, less organisation, less investments; in short: increased instructional efficiency.

Despite this positive potential, many studies have also pointed to challenges. The effects on learning of XR technologies highly depend on how they are designed (the application itself), how they are implemented (the instructor), which XR technology is being used and for what (content, educational goals), individuals' characteristics (prior experience with XR, prior content knowledge, innovation-mindedness), and context variables (organisation culture, organisational support and vision).

In order to tap into the potential benefits of extended reality technologies, careful design and thoughtful implementation are essential—alongside a clear focus on change management and scalability. A key opportunity lies in operating at the intersection of academia, industry, and public sector needs. Here the mission is to create meaningful XR solutions by bridging scientific insight, technological exploration, and real-world application. The Belgian XR ecosystem is gaining strong momentum here—especially when solutions are co-designed with domain experts and validated through user studies. Through close collaboration with SMEs, it is demonstrated how XR can significantly enhance safety, performance, and learning outcomes in both industrial and professional contexts. Still, while many solution providers excel at prototyping and piloting projects, we need better pathways for broad implementation and standardisation, particularly for SMEs. This calls for stronger collaboration frameworks and greater visibility into the ecosystem's capabilities—not just to understand who is building XR in Belgium, but also how we can more effectively collaborate, share expertise, and turn innovation into lasting impact.

As with any learning technology, XR is just a tool—not a magic wand. But when used consciously and designed and implemented collaboratively, it has the potential to offer truly magical experiences for both learners and instructors.

Carl Boel
UGent, Vives, UHasselt, XRHuis

XR in Engineering, Design & Visualization

Extend reality offers technical and vocational students a unique opportunity to learn in immersive, yet realistic environments. Through this technology, they can practice skills, explore abstract concepts, and visit otherwise inaccessible places anytime, anywhere, without barriers or risk. From operating machinery to understanding electrical systems or performing medical procedures. XR provides access to experiences that are otherwise difficult, costly, or even dangerous to recreate in real life. This innovative approach not only makes learning more engaging, but also significantly enhances the educational experience. Learners can experiment, make mistakes and learn by doing.

Despite its potential, integrating XR into education isn't always straightforward. Many teachers are curious and motivated to try this technology, but often face two major obstacles: cost and lack of experience/training. XR hardware and software can be expensive, and without proper guidance, it's challenging to implement effectively in the classroom.

Fortunately, initiatives like the XR Action Plan are helping to remove these barriers. RTC Antwerpen plays a key role in this project by selecting relevant content and offering a lending service. Schools can borrow high-quality headsets and devices, along with a curated library of educational XR applications tailored to technical and vocational education. Additionally, together with XR Academy, free teacher training is available to make teachers competent and confident in integrating this technology in their classrooms.

We are currently at the dawn of a true XR revolution. In recent years, many teachers have taken significant steps in exploring the possibilities of XR. These promising developments mark only the beginning of what's to come. The next challenge will be to integrate XR technology successfully in daily teaching practices.

Jelle Saldien
MICT UAntwerp

XR in Entertainment & Media

In the past decade, the digitalization of the media, the cultural and event sector has continued at a rapid pace. Customers do not only consume television, culture and events at one single location, at home or in (concert) halls. People experience media in hybrid formats, anytime anywhere, where the physical and digital worlds/avatars merge. Technological evolutions follow each other at an ever faster pace. Think of 3D scanning, virtual production, hologram projections, LED walls, gamification, Virtual and Augmented Reality, 5G, remote production and Generative AI.

The Belgian creative industries are facing major challenges today. They need to remain internationally relevant in a world dominated by big tech, rapid changing customer interests, rising costs (energy and infrastructure) and talent development, so that their employees remain future-proof and can respond to these challenges and technological developments.

Many of these challenges can be tackled collectively. XR Valley is also supporting the new VLAIO cluster Entertainment & Technology (ENT.A) that unites Belgian companies active in gaming, event, media, cultural and creative sectors. Therefore, the new vertical Entertainment of XR Valley is creating a community for events, networking, inspirational demos and XR Valley Hubs. In this way, XR Valley strives to ensure that Belgium can become a leading European region for entertainment. Interested in joining this community?

Tom Hameeuw
The Pack

XR in Healthcare

Extended Reality (XR) in healthcare has evolved from an experimental technology to a transformative force with immense potential across clinical applications, medical education, and therapeutic innovation. As leaders in Belgium's XR healthcare ecosystem, we've witnessed firsthand both the promise and the challenges of integrating this technology into our healthcare system.

Over the past decade, XR has matured significantly, finding applications in rehabilitation, surgical training, therapeutic interventions, and patient care. Belgium's renowned expertise in game development and technology innovation provides a strong foundation for healthcare-focused XR solutions. However, the pace of adoption in healthcare continues to lag behind other sectors, presenting both a challenge and an opportunity for our ecosystem.

The implementation gap remains our most significant hurdle. While brilliant XR concepts emerge regularly, the path from prototype to daily clinical practice is complex. Success requires more than technological innovation—it demands early engagement with healthcare professionals, clear pathways to reimbursement, robust validation processes, and alignment with the practical constraints of clinical workflows. European regulations, including MDR, GDPR, and the AI Act, while providing necessary frameworks, can also create competitive disadvantages compared to regions with less restrictive legislation.

Despite these challenges, we remain optimistic about the future. The convergence of AI and XR technologies promises to accelerate development, reduce costs, and create solutions that are more closely aligned with the needs of healthcare providers and patients.

This ecosystem mapping represents a crucial step forward. By providing a comprehensive view of Belgium's XR healthcare landscape—highlighting active players, existing capabilities, and identifying gaps—we can foster the connections necessary to move from isolated innovation to a unified, impactful ecosystem. Our goal is to ensure that XR doesn't just inspire but truly transforms how we deliver care, train medical professionals, and improve patient outcomes and experiences.

Together, we can position Belgium at the forefront of healthcare XR innovation, creating solutions that bring real, lasting value to patients and healthcare providers alike.

Lode Sabbe
UZ Gent

Sanne Broeder
In4Care

Carine De Potter
XR Healthcare Vertical Co-chair

Deloitte Digital combines creative, strategic, and technological expertise to help organizations transform how they engage with customers, employees, and citizens.

As part of the global Deloitte network, it delivers end-to-end digital services—from experience design and data integration to cloud architecture and product development.

In the field of XR, Deloitte Digital is at the forefront of immersive innovation, supporting clients in deploying XR solutions for immersive storytelling (marketing and sales support), training, and augmented workforce. By leveraging XR technologies alongside AI, Deloitte Digital empowers organizations from strategic support to rapid prototyping to deliver experiences at scale.

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Thank You.

For more information, please visit by scanning this QR code

Since 2022, XR Valley has been Belgium's non-profit hub for Virtual, Augmented, and Mixed Reality, driving growth and collaboration across the national XR ecosystem.

With a mission to boost economic development, build a knowledge-driven economy, and give regional industries a competitive edge, XR Valley connects tech innovators, researchers, creatives, businesses, and policymakers.

By fostering co-creation and cross-sector partnerships, the organization empowers the community to develop impactful XR solutions and position Belgium as a leading force in the global immersive technology landscape.

XR VALLEY
Augmenting the Belgian XR Ecosystem

Thank You.

For more information, please visit www.xrvalley.be


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