

Europe's Connected Life Sciences & Health Metropolis



Positioning Argumentation Guide

“

Our LSH Positioning has been created, as has the Action Programme ‘New Opportunities for Top Sector Life Sciences & Health,’ with broad stakeholder involvement. We have before us a fantastic opportunity to grow the sector, create synergies, and capitalize on new prospects that strengthen our LSH ecosystem and result in better outcomes for patients and economic growth. This booklet provides you with the foundation for communicating the ‘Europe’s Connected Life Sciences & Health Metropolis’ positioning in a coherent and coordinated manner. The more we connect, the more competitive we become!

”

Clémence Ross-van Dorp

Ambassador Action Programme ‘New Opportunities for Top Sector Life Sciences & Health’





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“Life Sciences is not a sector; it’s a culture.”

Travis McCready

In September of 2018, our high-level LSH delegation went on a fact-finding mission to Boston and Toronto. The trip was somewhat of a revelation. The companies and research centres we visited and the people we met and talked with provided us with diverse insights that we embraced and took back to the Netherlands in our notebooks, smartphones, heads, and hearts. The open-hearted exchange of best practices and experiences worked as a catalyst for all present, with all parties resolving to inject new energy into the Dutch LSH ecosystem by collaborating and working towards a common goal.

From the US perspective, the Netherlands had the potential to work together under one umbrella, eschewing regional messages and initiatives and consolidating its purpose. By working collectively, it was proposed, the Dutch LSH ecosystem could claim a leading role in Europe. The overriding advice was to develop a strategy to strengthen synergy in the Netherlands to help take our LSH sector to the next level.

To achieve this, we needed to stake a claim – The Boston of Europe – and to develop a differentiated positioning and messaging that would reflect our level of ambition both to the outside world and numerous domestic stakeholders. Out of this dynamic process, with the

involvement of many industry stakeholders, ‘Europe’s connected Life Sciences & Health metropolis’ came into being. A bold claim that encompassed all of our ambitions in making the Dutch LSH sector an even bigger force for innovation and development around the world.

Fast-forward two years, and what you have in your hands is further proof of that process in action. This booklet provides you with the reasoning behind the positioning, framing the country as a metropolitan area, revealing the scale and density of collaboration in our compact geographical footprint. It also gives you a foundation for unified storytelling and argumentation upon which we hope you will build further with your own stories. This is not an end-product – rather the beginning of the next phase. This is the continuation of our mission to show the world that we make a significant contribution to life, science, and health.

The 2018 LSH Boston Delegation.





1.

Why do we need a positioning argumentation guide for the Netherlands' Life Sciences & Health Top Sector?

When addressing a theme as complex and ambitious as establishing the claim of **'Europe's connected Life Sciences & Health metropolis,'** it helps to have some guidelines at hand so that the story is first of all understood, and secondly, communicated in a clear and unambiguous manner to relevant publics via all touchpoints. This is because what we are presenting, in essence, is a cultural message.

The constituent elements that go to make up the Life Sciences & Health (LSH) sector in the Netherlands are a complex matrix of interactions throughout the sector, with multiple themes and initiatives. Attempting to explain it in detail is an insurmountable task. For that reason, we have established the high-level positioning as a starting point where all of our stories, narratives and explanations flow from. Via our stories, we create the 'unbroken stream of evidence' that helps to underpin our claim and enables us to create an image of the Netherlands as a vibrant, connected, collaborative LSH community.

This document is intended to help you tell that story and to tell it in a way that is natural, logical, intelligent and inspiring. By explaining our proposition, we involve people in our story, and this gives us the platform to explain the genius that has driven many of our solutions to living in and creating a leading economy in a vulnerable, low-lying delta region.

We provide arguments and counterarguments, proof points, values, and standpoints that will enable you to talk about 'Europe's connected Life Sciences & Health metropolis', in a convincing and authoritative manner. It is through sharing this story that we can inform and inspire others to follow our lead.



2. Our vision

Our vision is to establish the Netherlands as 'Europe's connected Life Sciences & Health metropolis'.

Our goal is to communicate an image of the Netherlands as a vibrant, connected and collaborative community for Life Sciences & Health. By establishing a clear view of what our proposition entails, we present a competitive differentiation, which helps improve the sector's overall competitive strength.

This enables us to stand out against competing LSH hubs, clusters or regions within Europe and ultimately attracts talent, knowledge, and Foreign Direct Investment, creates jobs, boosts the economy, and drives exports and scientific collaborations throughout a global marketplace. Our cooperative, collaborative nature has led to the creation of strong alliances all over the world. We like to find our own path and often come up with innovative or unexpected solutions by looking at a problem from many different perspectives.

It also helps ensure that our unique LSH ecosystem stays in balance and grows in the directions that will support our areas of focus and expertise and strengthen our LSH business climate over the coming years. By attracting the right sort of businesses, filling in any existing 'witte vlekken,' we continue to build on our existing strengths as one of the most opportunity-rich areas in Europe for LSH.

The recent arrival of the EMA and the steady growth of the biotech segment are key elements that help to provide depth, dimension and momentum to the sector. In turn, the intrinsic value created over the longer term through collaborative development across public and private bodies helps drive potential business overseas. The Netherlands becomes perceived as 'the Boston of Europe' – a location that drives advances in Life Sciences & Health. This perception helps companies based in the Netherlands to connect to global markets with a value proposition and to grow the export potential of the sector.



“Working together is part of the Dutch DNA. By collaborating with the best, we can identify innovative solutions that matter.”

Hans Schikan
Top Team member, Top Sector Life Sciences & Health
(Health~Holland)



3.

Our message is simple: the Netherlands is THE location in Europe for Life Sciences & Health

The idea of connectivity is not just about the fact of being connected in whatever shape or form. It has to be much more than that and we need to explain what connectivity brings; the value it brings to potential collaborators, the deepening of knowledge, the advancement of healthcare and the benefit to the patient. It is about the inherent value that connections can generate when related to investment, innovation, trade and knowledge.

Resourceful & consistent

The Dutch medical and biotech companies, start-ups, research institutes and academic medical centres are bursting with ground-breaking research and new ideas. Ideas that lead to new alliances and resourceful ways to improve healthcare and life sciences. For everyone, everywhere. Public-private collaborations and investments are important drivers of innovation and improvement. The Netherlands is in the top 10 of patent applications worldwide and consistently ranks highly in the Global Innovation Index (No.2 in the EU). Right now, there are hundreds of ongoing clinical studies and countless new medical products in the making.

Integration

In the Life Sciences & Health sector in the Netherlands there is continuous cross-pollination between science, business, government, and knowledge institutes. Our academic medical centres distinguish themselves

through an extensive integration of scientific research, education and patient care. We are leading in oncology, cardio-vascular research, immunology, regenerative medicine, neuroscience, vaccine development, cohort studies and biobanks. And we are the front-runner in mobile healthcare.

Over the last fifteen consecutive years the healthcare system in the Netherlands has been ranked in the Top 3 of the Euro Health Consumer Index; a leading assessment of the performance of national healthcare systems in 35 countries.

Some examples of proof-points that support our arguments:

- The relocation of the European Medicines Association to Amsterdam in 2019, can be viewed as a vote of confidence in our LSH ambitions.

It strengthens our LSH ecosystem and provides a welcome impetus that stimulates growth, heightens visibility and encourages collaboration.

- Game-changing inventions – From the microscope to ECG, from dialysis to bio heart valves and new revolutionary DNA editing techniques.
 - Well-staffed and talented health sector – 13.4% of the Dutch workforce is active in the LSH sector.
 - Innovative thinkers – We are consistently ranked in the international top 10 of patent applications.
 - One of the leading countries for innovation –
- The Netherlands is ranked consistently in the top 5 leading countries in the Global Innovation Index. (No.2 in the EU) (2020 report)
 - High-level science – We're in the top 10 in biochemistry, genetics and molecular biology when it comes to research and cited publications.
 - Booming Life Sciences sector – Number of companies doubled in the last ten years.
 - Front-runner in e-Health solutions – We have the highest ICT penetration in hospitals and clinics.
 - First gene therapy (UniQure)



Photo : Reginar Photography

Looking abroad

To assist the sector in its presentations abroad, the Action Programme 'New Opportunities for Top Sector Life Sciences & Health' has been elaborated around seven themes which provide the inspiration for specific narratives. From fundamental research to directly applicable solutions, narratives can be generated that communicate the strengths that the Netherlands possesses in Life Sciences & Health.

These narratives cover the following seven themes:

1. Regenerative medicine and stem cell therapy
2. Infectious diseases and vaccine development
3. Data & artificial intelligence
4. Drug discovery & development
5. Cohorts and biobanks
6. Health technology innovation & implementation
7. Lifestyle medicine and prevention

While our claim is based upon a position we assert in Europe, this does not mean that we solely focus on operations within the European marketplace. As with almost every other industry, a concentration of knowledge, centres of excellence, innovation incubators and accelerators, knowledge institutes and established major organisations and edgy start-ups all combine to create an ecosystem of excellence whose influence is far broader and more far-reaching than its location would confer.

Parallels

Think of Silicon Valley – we have all grown to accept the fact that it is the foremost location for driving high technology and innovation, initially in the IT and computer industry, but now much broader. It attracts the best global talent, as people want to work at the heart of this established, dynamic ecosystem. What is developed there, impacts millions of lives around the planet, drives societal developments and countless economic opportunities. The SF Bay Area has roughly the same number of Life Sciences companies as the Netherlands, Switzerland, or Sweden. (The description 'Silicon Valley', initially coined by journalist Don Hoefler

in 1971, took around ten years before it truly became an established term.*)

Our ambition is rooted in the same intent. Our focus is on creating the right circumstances for the advancement of global healthcare from our dynamic LSH location here in Europe. And what we create, invent, develop, here in the Netherlands, can be implemented around the globe to improve outcomes for millions of people wherever they are.

**The San Francisco Bay Area, where Silicon Valley is located, is of similar area and population as the Randstad.*

“The Netherlands shines in connectivity and scalability. Knowledge and experience in closing loops in value- and production chains are likely to become important Dutch export products.”

Andy Ridley
CEO of the Circle Economy

CONNECTION TO INNOVATION :

Co-creating solutions to global challenges

Mission-driven Top Sector and Innovation Policy

Health & Care is one of the major societal themes within the government's Mission-driven Top Sectors and Innovation Policy, coordinated by the Ministry of Economic Affairs and Climate Policy (EZK).

This ambitious and novel approach to business policy is inspired by the insights of Professor Mariana Mazzucato, Professor in Economics of Innovation and Public Value at University College London, and founder/director of its Institute for Innovation and Public Purpose. Mazzucato's research focuses on the relationship between financial markets, innovation, and economic growth – at the company, industry, and national level.

Global connection

The idea is that the formulation of a mission provides focus and direction for social, scientific, and business innovation processes. Within the societal theme of Health & Care, citizens, healthcare professionals, companies, and scientists, connect, collaborate, and co-create solutions to the major global challenges. Having an inspiring goal helps to guide this process. Over the coming years, this public-private coalition, drawn from across society, will work on developing policy and practice that will also lead to economic opportunities.

Golden connection

The innovative strength of our public-private partnerships is another golden thread in both the Knowledge and Innovation Agenda (KIA) 2020-2023 and the Knowledge and Innovation Covenant (KIC). Dutch research centres (universities, universities of applied sciences, UMCs, and other institutes) are highly ranked globally. The same is true for Dutch knowledge-driven companies, including SMEs.

Top Sector LSH and its associated top sectors have realised many public-private partnerships in recent

As a tightly-linked eco-system, a successful Life Sciences cluster needs thriving and diversified industry players in close proximity. It depends on quality suppliers, financial investments, available human resources, research capabilities and innovation. These are provided by a combination of innovative Biotech therapeutics and Pharmaceutical companies, Biotechnology service companies, Contract Research

Organizations (CROs) and Contract Manufacturers and MedTech companies as well as investors and universities. A cluster creates a local pool of talent, expertise and know-how, affording companies the opportunity to outsource non-core tasks while focusing on key value drivers.”

KPMG -
Site Selection for Life Sciences Companies

years (Onco Institute, RegMed XB, etc.). These have given rise to a future-savvy knowledge and innovation infrastructure. The technologies and therapies needed for the missions can be developed from out of the basis of this infrastructure and, through social innovation, be used by everyone. The intra-sectoral and intersectoral

collaboration will be expanded further so that by 2040 we will enjoy five more years of healthy life. In doing so, the aim is to reduce the socio-economic health differences that have proved so difficult to manage up until now by 30 percent.



4.

What do we mean when we say: ‘Europe’s Connected Life Sciences & Health Metropolis?’

By claiming ‘Europe’s connected Life Sciences & Health metropolis,’ we zoom-out from detail and present a positioning based on key and unique aspects of our geography, location, culture and mindset, that help to define our proposition as unique. These aspects then come to form the ‘added value’ that our unique offering brings to the sector, to companies and individuals working within it in the Netherlands, as well as how that translates to what we bring in terms of drive, collaboration, innovation and insights that benefit the rest of the world. It is not solely about what we can offer organisations that consider, or choose, to locate here. It is also about how our ‘connected Life Sciences & Health metropolis’ creates an environment for excellence which we can then export around the world.

The complexity, and beauty, of the concept can, however, be explained in terms that are easier to grasp, and which, at the end of the day, go much further in embedding the theme in the minds of the target audiences. This is because ‘Europe’s connected Life Sciences & Health metropolis’, is as much a state-of-mind or way of thinking and working, as it is smart solutions or cutting-edge innovations.

Unique differentiators

The message ‘Europe’s connected Life Sciences & Health metropolis,’ is essentially the Dutch DNA framed in the context of a rapidly globalising world with all its inherent challenges and opportunities. It encompasses many of the aspects of Dutch culture and business that have been created and refined over centuries. Genuine values, unique perspectives, and ways of working that have evolved out of necessity over centuries. It is a unique intellectual property that no other nation can copy – because it is authentic. And in today’s world, our ability to stand out is what differentiates us from the competition.

Realistic expectations

Whilst we don’t pretend to have answers for absolutely everything and we don’t claim that every one of our solutions are the best in their class, taken together what we present is a strong body of evidence that highlights the fertile and welcoming environment for the furtherment of Life Sciences & Health that we have established here in the Netherlands.



Beyond borders

The solutions, innovations, inventions and practices that we are able to generate within our thriving and compact LSH ecosystem benefit not only patients and citizens within the Netherlands. Our knowledge, our biotech breakthroughs, our MedTech wonders and future-focused healthcare are also key exports, reaching worldwide markets and impacting the lives of people around the globe.

1 + 1 = 3

We do not claim to be the 'best connected' or the 'most connected' as these are subjective claims that could be challenged – certainly when used over a longer period.

We simply imply that we are, by nature, a connected ecosphere. The sum total of the LSH collateral that is contained within our cities and regions is greater than individual cities and regions on their own. As the physical scale of the Netherlands is small, travel distances short, and communication lines direct, then our connectivity is the 'glue' that binds together the various elements.



“...the human capital of nations is more than ever the most critical factor in their economic progress.”

Simon Anholt

Independent policy advisor, Anholt-GfK Roper





5.

Can we really claim this positioning?

Life Sciences businesses in the Netherlands profit from countless opportunities for growth and collaboration. The highly collaborative Dutch Life Sciences & Health community includes 3,100 R&D life sciences companies, 420 biopharmaceutical companies, 65,000 employees in pharmaceuticals and a 4.7-billion-euro MedTech market. Not to mention, 26 campuses, 8 university medical centres (UMCs) and 13 universities engaged in Life Sciences research. All this potential is located within a 2.5-hour drive radius.

Our connectedness is also embodied in the open and welcoming attitude of the Dutch to collaboration and knowledge exchange. The strength and efficacy of Public-Private Partnerships is a testament to this. The open-door policy of many research institutes means that it is very easy for companies to tap into academia and the associated talent pool. This too is unique and once again underpinned by authentic Dutch characteristics: "It's not what we do for you; it's what we do together with you that counts!"

Connectivity can be expressed in numerous ways and, fortunately, our claim can be underpinned with evidence on various levels.

On a human level:

- More than 500 public-private partnerships, such as Lygature, RegMedXB and Oncode Institute thrive in the Netherlands, facilitated by the Top Sector Life Sciences & Health, Health~Holland. What's the secret to success for public-private partnerships in the Netherlands? The Dutch take a 'quadruple helix' approach to collaboration, involving the participation of businesses, knowledge institutions, government, and citizens.
- The 2020 Global Talent Competitiveness Index places the Netherlands 6th out of 132, acknowledging its ability to develop local talent and attract people from around the world. Life Sciences & Health benefits from talent availability in the form of an excellent academic research infrastructure.

- University medical centres (UMCs), (technical) universities, and regulatory bodies such as the European Medicines Agency (EMA) in the Netherlands collaborate in a unique manner within a robust LSH research and innovation ecosystem. Short lines between laboratory and clinic enable feedback loops that link back into fundamental research and on to innovations that find their way to the patient and the marketplace.

On an intellectual (IP) level:

- A deep, ongoing commitment to innovation pays off: the Netherlands currently ranks No. 4 worldwide in patent applications for medical technology (MedTech), No. 6 for biotechnology patents, and No. 8 for pharmaceutical patents. The Netherlands is also the world market leader in medical isotopes,

while companies and hospitals embrace future-oriented solutions such as eHealth and personalized medicine.

- Ranked No. 1 in the EU in KPMG's Growth Promise Indicator.
- The Netherlands has ranked in the top 3 of the Euro Consumer Health Index for the past 15 years.
- We are leading in oncology, cardio-vascular research, immunology, regenerative medicine, neuroscience, vaccinations, cohort studies and biobanks. We are also a front-runner in mobile healthcare.



On a physical level:

- We are physically connected with and to the rest of Europe.
- Our physical infrastructure of road, rail, air, maritime, and inland waterway links provides an intricately connected smart matrix, ideal for logistics and travel and direct access to the European hinterland.
- We are the most connected country in the world according to the DHL Global Connectedness Index – a title we have proudly held since 2005.
- As a global trading location our imports, exports, and transshipments move seamlessly through some of the smartest transportation hubs in the world – Port of Rotterdam, Schiphol Airport.
- Our digital infrastructure is almost unparalleled featuring high penetration of broadband connections (94% of households) and the Amsterdam Internet Exchange (AMS-IX) – has been playing a crucial role at the core of the Internet for more than 25 years and is one of the largest hubs for internet traffic in the world, connecting global users in an efficient, fast, secure, stable and cost-effective way.



6.

Framing the country as a metropolis

Firstly, by framing the country as a metropolitan region with the statement: ‘Europe’s connected Life Sciences & Health metropolis,’ we immediately create an image in a prospect’s mind that scale is significant here. Moving from the perception of a country, to the image of connected clusters, hubs, knowledge institutes, and companies, all within short distances of each other, we begin to reveal a high degree of proximity.

Scale

We are also able to show that there is a high concentration, or density, of Life Sciences & Health initiatives within a relatively small geographical area. Cities that are 10-, 20- and 30-minutes apart start to appear more as suburbs of one large conurbation. The realisation that so much expertise and knowledge is concentrated in this small area immediately creates an image of close collaboration.

Context

There is also much talk of the Netherlands being ‘the Boston of Europe’ – a phrase which has had considerable exposure within the LSH communities on both sides of

the Atlantic. Aligning the scale of the Netherlands with that of large metropolitan areas in the US such as Greater San Francisco or Greater Boston, and the Golden Triangle in the UK (Cambridge, Oxford & London), helps to play into existing perceptions and level the playing field.

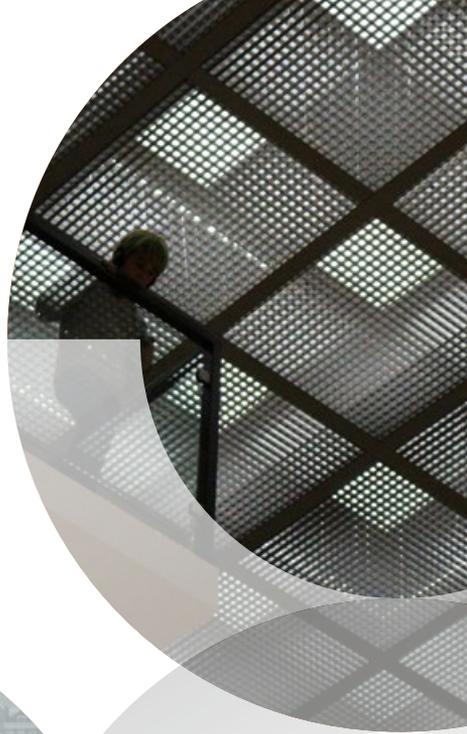
Proof

When this is coupled with the background story of the Dutch cultural DNA which is adventurous, pro-active and collaborative – a story deeply embedded in the history and the topography of the country – then we start to create an intellectually-based, competitive, differentiated positioning which is unique to the Netherlands.

When looking to position our offering against those of competitors, it is vital that we identify and adopt highly authentic parameters that are difficult to challenge or to beat, because they are based on truth and unicity.

Regional perspectives – working together

By aligning our messaging under a unified positioning, we step away from focusing, in the first instance, on regional propositions or strengths. Just as, in the national positioning we do not refer to ‘most connected’ or ‘best



connected', we must also be aware that, wherever possible, we do not adopt a regional standpoint that potentially excludes other regions.

Purely for illustration purposes, an example could be:

'XXXNL – the best location in the Netherlands for serving the European hinterland' - a message that works to the exclusion of other regions (who could also possibly make the same claim).

It is more effective to consider descriptive terms such as 'a centre of excellence' or 'a leading cluster' and then go on to explain the strengths and unique proposition of the region.

The key to successful implementation is to always view things first through a Connected lens. This means beginning with the strong, national-scale Connected positioning to attract prospects and then later going on to build on the regional offering.

Visual underpinning

Key for the visualisation of the framing is the 'hero-graphic' of the Tube-map, revealing the close connections amongst clusters, research institutions, key players, etc. in a comprehensive, compact overview. This visually conveys the message of density, community, and complementarity.

This visualisation consists of subject-specific images which can be used on their own, to which may be added additional layers or overlays revealing multiple topics.

It is important that the visualisation fits within current templates and that there is room for zooming in on specific regions, hubs or ecosystems. As with all visual and graphic materials, the 'afzenderschap' must be clearly shown – from national and regional perspectives – in correct relation to each other.

See Chapter 9.







7.

The leading pillars supporting the claim

The challenge in creating a differentiated positioning is to discover a proposition that is distinctive, creative, sharp, and motivational, yet based on robust, truthful, simple, universal elements.

Europe's connected Life Sciences & Health metropolis:

- **Is creative** – it stands a chance of being noticed in an increasingly crowded and noisy global marketplace;
- **Is ownable** – it is based on existing reputation and embodies truthfulness, credibility and distinctiveness;
- **Is sharp** – tells a specific and definite story about the place and connected to its current reputation – it is not a bland, generic assertion;
- **Is motivating** – it guides people towards new and different behaviours in government. It is a key for making people see themselves in a new way, act in a new way and eventually be seen in a new way;
- **Is relevant** – a good reputation works inside and out: it has a meaningful promise to the internal stakeholders and to customers alike, to tie into the marketing function;
- **Is elemental** – usable, practical, and robust enough to be meaningful to many people in many situations over a long period of time.

8.

Common misperceptions and how we reframe them

There is always going to be pushback or challenges to the assertion of the positioning. And that's fine. A strong positioning, staking a bold claim, will often polarise opinion. The absolute worst that can happen is that nobody particularly likes or dislikes it, and it becomes just wallpaper. As nation branding guru Simon Anholt states: "It is far easier to turn a strong negative into a strong positive than it is to turn nothing into anything at all." Challenges and discussions are great because give us the opportunity, or the license to explain exactly what we mean. Typical arguments that might be encountered:

Example 1

"Ireland also uses the theme of connected in its Foreign Direct Investment & Export development communications. Doesn't that compete with our positioning?"

Our positioning is not that we are 'connected'. Our positioning is 'Europe's connected Life Sciences & Health metropolis.' Implicit in this message is the promise of a thriving ecosystem in a compact geographical area with all the inherent value that that creates for both inward investment and export, in the field of LSH, on the European continent. (There is a veiled reference here to the fact that a key competitor, the UK, due to Brexit, is not anymore.)

'Ireland Connected' is possibly a smart marketing strategy by the Irish government, delineating itself from the UK while simultaneously emphasising its links to Europe and the rest of the world. Consequently, its communications are generally limited to that single theme:

"Ireland as the largest English-speaking area within the Single Market post-Brexit."

"...recognition of Ireland as a global citizen who values international trade..."

"As a small country, global connections and successful participation in the global economy is what allows us to deliver higher standards of living ..."

"Ireland remains an active and committed member of the EU."

Why is this particular messaging important for Ireland? Many people around the world are unclear as to exactly what the relationship is between Ireland, the United Kingdom, and Great Britain. It's complicated. Ireland is therefore determined to communicate that it is still



connected to the EU and the rest of the world so as not to suffer under the long shadow of Brexit. This is an entirely different proposition to ours.

Apart from the overall umbrella statement - "Ireland Connected provides an overarching framework, aimed at strengthening our approach both at home and overseas to trade and investment to deliver greater visibility and economic impact for Ireland." - there is little attempt to explain how 'connected' is embodied within this context. Our stories and narratives must use the aspects of human capital, history, and location to provide the 'unbroken stream of evidence' as to 'why' things are done differently here. It is the incontrovertible evidence of what makes us different as a nation that sets us apart.

Furthermore, if we talk about staking a bold claim – this will never be featured in the top-10 of anyone's ambitions:

"...we must think carefully about what we are saying and use words with a clear meaning and context."

"Our ambition – delivering outcomes."

The dictionary definition of outcome is: 'a possible or likely result of something'. There is no qualifier - such as delivering 'better' outcomes, or delivering 'intelligent' outcomes. Who knows? We can conclude from this that we must think carefully about what we are saying and use words with a clear meaning and context, rather than generalised, cover-all statements.

Example 2

“There is an existing perception that the core of LSH activity in the Netherlands takes place mostly within the Amsterdam/Randstad conurbation.”

The positioning statement: ‘Europe’s connected Life Sciences & Health metropolis’, is designed to be inclusive, therefore no individual region is highlighted as ‘paradepaardje’. The intention is to ‘frame’ the Netherlands as a compact, connected community, creating an over-arching national positioning within which all regional investment partners can fine-tune and formulate their own strengths and arguments.

An essential element of communicating this key aspect is the Tube-map hero-graphic. This has been crafted specifically to show the dispersion of LSH-related bodies throughout the entire country and highlight the connectivity

amongst them. Bringing a scale element into play helps put distances into perspective. We must remember that the goal of an over-arching positioning is to align all messaging to the common goal, which is communicating that the Netherlands is a rapidly growing collaborative hub for Life Sciences & Health, on the European continent and worldwide.

Example 3

“We want to use our existing assets to position our region as the ‘Gateway to Europe’ / the biggest / best / most dynamic – region in the Netherlands.”

As highlighted in Chapter 5, (Regional perspectives – working together) in both inward- and outward-bound activities we must move away from communicating LSH propositions from a purely regional/location perspective. Messaging should always be created from a ‘top-down’ view – leading with the national proposition of well-



connected hubs, research centres, industry partners, and government bodies. A holistic approach allows us to bundle our strengths in our total offering before zooming in to a regional strength, theme, or focus area.

Global multinationals have differentiated product offerings in different territories, but the brand is universal and over-arching. With McDonald's, for example, you know exactly what to expect when you walk into one of their franchises anywhere in the world because the concept is essentially the brand. That is the top-level messaging. However, there will be variations in product offering that are tuned to local culinary and cultural influences. Always work on the premise: 'global' then 'local'. By working this way, we move away from competitive messaging that is exclusive and possibly confusing to potential interested parties. Less noise = better focus.

“We've had an excellent relationship with Erasmus UMC. We can literally jump on our bicycle and be there in minutes. However, we also cooperate, for example, with Groningen University and Amsterdam MC. The Netherlands' compact size means that collaboration between clusters, hubs, science parks, and industry is frequent and intense. Our country is about the size of Rhode Island – one of the smallest states in the US.”

Marc Kaptein
Medical Director, Pfizer, Rotterdam.

9.

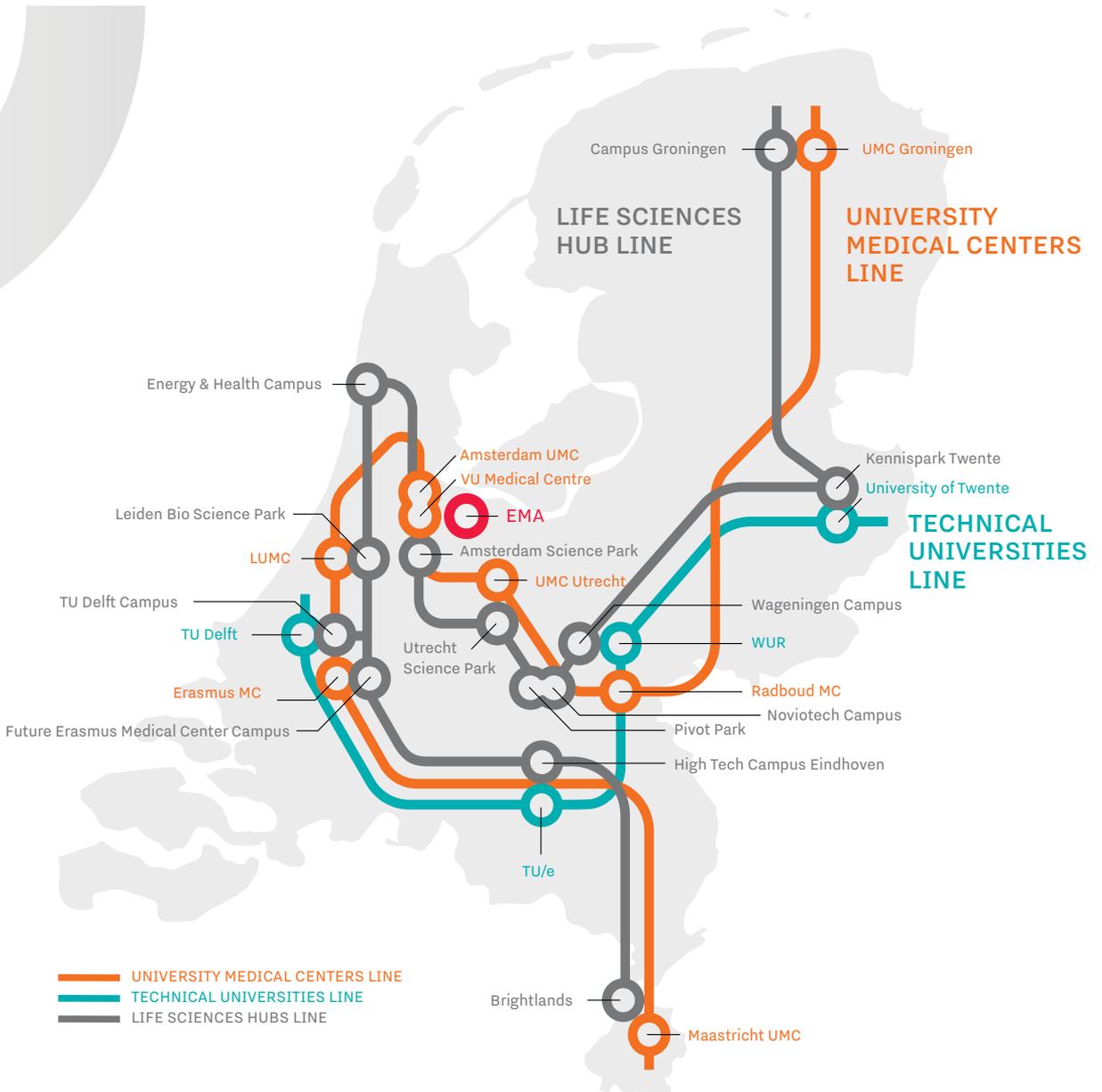
The Tube-map serves as a leading graphic, connecting University Medical Centres, Life Sciences Hubs, Technical Universities, and more.

The Tube-map hero graphic is a key element in the overall positioning. Its purpose is two-fold. Firstly, it reframes the Netherlands as a major conurbation which helps people to understand the short distances involved here. The analogy of a countrywide metro-line helps to establish the perception in the viewer's eyes of a compact and connected environment. Again, referring to the San Francisco Bay Area – if one were to overlay a map of the Bay Area over that of the Netherlands it would cover an area equivalent of the Randstad. In this way what are initially perceived to be separate cities, suddenly appear to be virtually suburbs of the same connected conurbation.

Secondly, the various overlays reveal the links between different categories of subject matter enabling the viewer to see the locations and links between specific centres of excellence, clusters, science parks, hubs, research centres, etc. The graphic offers an explanation of what we claim in our positioning statement and the two work symbiotically as well as individually.

Illustration of various line arrangements:

The 'circle and line' motif is an additional graphic element that helps to tie graphics and text together in documents and presentations (within existing house-style templates and styling).



This Tube map graphic is a dynamic document and is continually updated.



10.

How much do you know about our positioning? Test yourself!

- 1) What is the primary purpose of the Tube-map graphic element?
- 2) What is the secondary purpose of the Tube-map graphic element?
- 3) Is it okay to lead communications with a regional/location focus?
- 4) How do we explain what 'connections' deliver in relation to our positioning?
- 5) Can you say: "Region XX is the Gateway to Europe"?
- 6) What makes the aspect of 'connection' unique in the Netherlands – which cultural/historical aspects/traits underpin this position as authentic?
- 7) Which country aspires to be 'the Boston of Europe'?
- 8) Name three 'proof-points' that support our positioning?
- 9) What are the seven themes within the National Action Programme 'New opportunities for the Top Sector Life Sciences & Health'?
- 10) When we talk about a connected Life Sciences & Health metropolis – which (global)city area(s) can we refer to as an analogy for explaining our proposition?
- 11) What are the cultural 'unique differentiators' that validate our claim and support a differentiated positioning?
- 12) Which EU country also attempts to claim the theme of 'connected' in its marketing?
- 13) Which position are we ranked in the EU in KPMG's Growth Promise Indicator?

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