Visionary Insights into
Technology &
Advanced Life Sciences

vitals

Knight Frank



The Missing Middle:
International Lessons for Australia's Innovation Precincts & Ecosystems

Knight Frank Netherlands Study Tour

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Executive Summary

Australia's innovation challenge is not a lack of ideas – it is a lack of environments that consistently turn those ideas into impact, sovereign capability, and scaled companies. Our universities and institutes produce world-class research, but too often discoveries stall in the "missing middle" rather than translating into enduring national advantage.

The Netherlands offers a relevant blueprint. A mid-sized nation by GDP and population, it has deliberately built critical mass in life sciences, health, semiconductors, agri-food, AI and digital technology. Dutch precincts demonstrate that with the right mix of governance, capital, infrastructure, and culture, even a country of 17 million can anchor global industries.

This report distils lessons from our September 2025 study tour across Dutch science parks and innovation districts. It is written for decision-makers in government, academia, capital markets, innovation SMEs, and industry, with the purpose of moving Australia from aspiration to execution.

The lessons were striking

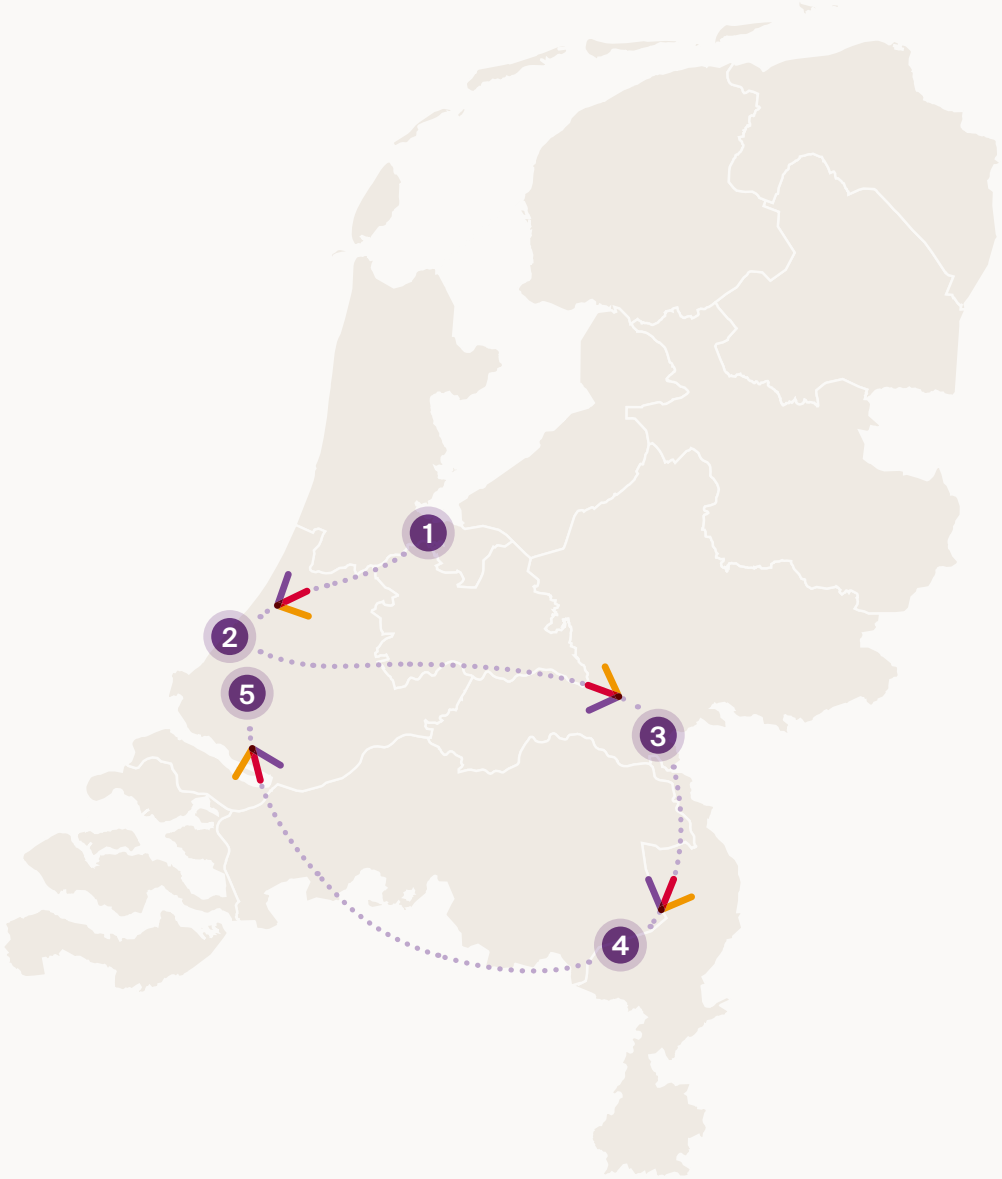
In **Leiden**, we saw how governance is institutionalised: government, academia, industry, and community sit on boards together, shaping strategy in real time. In **Utrecht**, One Health is not a slogan but a lived reality - human, animal, and plant sciences converging with AI to solve planetary health challenges. **Brainport** showed us the economic power of clustering: what started as a Philips spinout now contributes ~€32 billion annually - around 3% of Dutch GDP. **In Bilthoven (Utrecht),** 80% of the world's polio vaccine is produced, reminding us that sovereign capability is not abstract policy but a matter of global health security. At **Amsterdam Science Park,** the world's largest internet exchange (AMS-IX) and Europe's fastest supercomputer demonstrated that **data is infrastructure** as vital as roads or energy.

Across these and other sites, the Dutch story was consistent: success came not from chance, but from design and long-term alignment. Critical mass was engineered, vocational pathways (hogescholen) were embedded, and institutional investors like ASR, Kadans Science Partner and GIC played the long game - measuring returns not just in yield, but in GDP contribution, resilience, and community impact.



What We Learnt on the Ground

- **Triple and Quadruple Helix Governance**
  Structured collaboration is not just rhetoric-it's systematically embedded in governance, funding, and tenancy. Government, academia, industry, vocational education, and community partners co-create the rules and culture of innovation precincts.
- **Vocational and Applied Pathways**
  Hogescholen and applied sciences institutions – equivalent of Australian TAFEs – are deeply integrated in every Dutch precinct, producing not only pathway graduates but the technical, operator, and mid-tier talent essential for innovation ecosystems. Vocational training is a core strategic partner, not an adjunct.
- **Critical Mass and Clustering**
  Regional clusters like Medical Delta demonstrate how deliberate density and colocation drive resilience, collaboration, and scale. The Brainport regional cluster alone contributes ~3% of Dutch GDP, showing that scale is engineered - not accidental.
- **One Health and Convergence**
  Integration of human, animal, plant, and environmental sciences—with digital and AI as fundamental cross-cutting capabilities - accelerates translational research and global differentiation.
- **Applied Research Backbones**
  Netherlands Organisation for Applied Scientific Research (TNO) plays the role CSIRO must champion in Australia: embedded, connected nationally, and relentlessly focused on industry translation, adoption, and scale-up across all clusters.
- **Sovereign Capability**
  Successful Dutch precincts are not just real estate - they anchor national security in semiconductors, biotech, and vaccine production; Brainport secures chip supply chains, Delft drives industrial biotech, Bilthoven produces 80% of global polio vaccine stock.
- **Data as Infrastructure**
  AI, digital platforms, and open data are treated as sovereign, not optional, assets. Data is embedded in every aspect of ecosystem design, underpinning research, mobility, housing, and collaboration.
- **Open Innovation and Transparency**
  Collaboration, IP sharing, and data openness are built directly into operations, tenancy and governance. Ecosystem curation is active and visible, not simply assumed. Investment horizons are measured in decades, not years.
- **Storytelling Anchors Value**
  Dutch precincts use clear narratives, metrics, and proof points to demonstrate global relevance and attract partners.



1 Amsterdam

2 The Hague

3 Nijmegen

4 Eindhoven

5 Delft

Why It Matters for Australia

For Australia to compete - and lead - in the global innovation race, precincts must evolve from simply being urban masterplanned spaces to finely curated, living ecosystems.

The Dutch experience highlights that impact and sovereign capability only emerge where strategy goes beyond buildings and is anchored in investment, partnership, and ecosystem design.

Australia's competitive edge will depend on learning and embedding these insights:

- **Strategy, not Surface**
  Vibrant ecosystems are built around deliberate curation - of people, research, capital, and partnerships - not just iconic architecture or colourful urban design plans. The emphasis must shift from "what does it look like?" to "how does it create impact?"
- **Applied Research and Vocational Integration**
  Precincts thrive by making applied research organisations (CSIRO, AIMS, ANSTO, state institutes) and TAFE or vocational education core elements of both governance and daily activity - instead of afterthoughts, they must be central innovation engines and anchor tenants.
- **Sovereign Capability as a Determining Lens**
  Australia should plan explicitly for resilience - bolstering core industries and emerging like vaccine manufacturing, semiconductors, biotech, critical minerals, advanced food systems, and critical digital infrastructure. Rental yield is no longer enough; national advantage and sovereign security are strategic imperatives.



- **Infrastructure Means More Than Labs**
  Mobility, data platforms, connectivity, affordable housing, and cultural programs are fundamental infrastructure for 21st-century innovation - these are not "soft" extras but essential enablers of productivity and talent attraction.
- **Capital Market Alignment**
  Patient, informed capital is vital. Short-termism kills ecosystems. Investors - public and private - must value curation, clarity, and long-term community impact over immediate returns.
- **Build on What Exists**
  Australia must strengthen and grow from existing talent, institutions, and regional strengths - rather than gambling on "unicorns," invest in the scale-up of proven capability and infrastructure.
- **Foster Multidisciplinary Convergence**
  The next global frontiers are defined by blending digital, food, health, animal, and climate solutions - done visibly, both on the ground and virtually, for all to engage.
- **Open Innovation, Data, and Transparency**
  Treat data, IP openness, and collaboration not as slogans but as rules – embedding them into tenancy agreements, partnerships, and precinct operations.

Next Steps for Australia

This report is not a travelogue. It is a strategic document designed to inform precinct development, policy alignment, capital attraction, and ecosystem curation across Australia. The Netherlands proves that with the right governance, long-term capital, and ecosystem design, small nations can compete and win globally.

For Australia, the lesson is clear: align research, policy, and property to build places of translation and commercialisation – not just discovery.

FOREWORD

At Knight Frank, our work goes beyond property and pure consultancy - it's about building the connective tissue between research, business, capital, infrastructure, and community.

Our team has helped deliver and transact innovation precincts, research parks, and precinct strategies across the country, but our ambition is not only to be market experts – it's to shape places and systems that unlock Australia's full innovation potential.



So, why invest in study tours?

We believe the best learning takes place on the ground, where ideas come alive in real ecosystems - not just in reports or boardrooms. To do this well, we need to constantly scan globally, learning from ecosystems that have already solved challenges Australia still grapples with. That is why we lead regularly international study tours - to expose ourselves and our partners to world-class precincts, and to bring back lessons that can be adapted at home - well beyond familiar territory

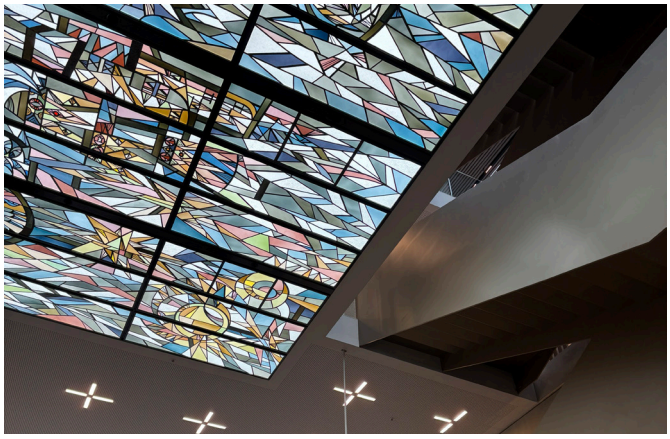
In 2024, we ran a successful United Kingdom study tour, visiting London, Oxford, Cambridge and beyond. That experience demonstrated the value of immersing an Australian delegation directly in the environments where innovation is curated at scale. It also confirmed the power of travelling as a cross-sector group - policy makers, academics, investors, developers, incubator leaders, start-ups and industry partners - who could debate, test, and apply insights together.

In 2025, we took the next step: the Netherlands. Why? Because it is a mid-sized nation, like Australia, that has deliberately engineered critical mass in life sciences, health, semiconductors, agri-food, and digital technology. Dutch precincts - from Leiden BioScience Park's biotech leadership to Brainport Industries Campus' sovereign manufacturing model - show how governance, capital, infrastructure, and culture can align to turn research into GDP, sovereign capability, and global competitiveness.

Our delegation reflected the triple and quadruple helix that underpin all great innovation ecosystems: government departments shaping national policy, universities and research institutes leading discovery, investors and developers providing capital and delivery expertise, and incubators and start-ups representing the entrepreneurial edge. Together, on the ground, we saw how Dutch precincts hardwire applied research, vocational pathways, long-term capital, and cross-sector collaboration into their DNA.

This report captures those lessons. It is written for a national audience - whether you are shaping policy, investing in infrastructure, leading a research institute, scaling a company, or developing the next innovation precinct.


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Venture
EQUINIX
SCIENCE PARK
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Behind the scenes of innovation

How Knight Frank Helps Ideas Become Impact

When people think of Knight Frank, they often think of property. What they don't always see is the depth of our work in innovation, life sciences, and ecosystem strategy - until they're in the room with us.

We've helped governments shape governance models, supported universities in embedding commercialisation into campus infrastructure, and worked with start-ups and scale-ups to secure lab space, pilot plants, and flexible manufacturing facilities. We've also advised institutional investors on how to structure long-term capital into innovation assets that deliver more than just yield - they deliver national capability.

But our role doesn't stop at strategy or transactions. We manage the day-to-day reality of innovation precincts - facilities, operations, compliance, and tenant experience. From shared lab infrastructure to multi-tenant buildings and precincts, we ensure the physical environment supports the ecosystem it's meant to serve.

Our work spans the full lifecycle of innovation precinct development

Policy and Governance

Aligning with national and state frameworks.

Ecosystem Strategy

Building collaborative governance structures.

Infrastructure Pathways

Shaping the property, labs, pilot plants, and digital platforms that enable scale.

Capital Markets

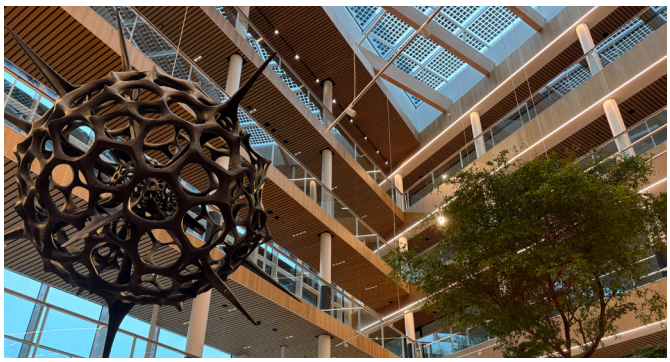
Structuring investment opportunities that attract long-term capital.

Facilities and Asset Management

Overseeing operations, maintenance, and tenant experience.

Precinct Activation

Curating community, branding, and ongoing stewardship.



We don't just advise - we deliver. Our teams are immersed in the market, working across every state and territory. We bring validated data, commercial evidence, and real-world experience to the table - across health, agri-food, energy, marine, and digital sectors.

What makes our approach different is how we connect the dots. We work simultaneously with government, academia, research institutes, start-ups, SMEs, and investors - ensuring precincts don't stall between research and market. We understand capital markets as well as policy frameworks. And we see real estate not just as infrastructure, but as a platform for innovation.

It's why we created the International Study Tour Program. Seeing how other countries do it - on the ground, in the labs, in the boardrooms - is the fastest way to shift thinking and accelerate delivery. That's why we brought a cross-sector delegation to the Netherlands: to learn from a country that has deliberately built critical mass in life sciences, semiconductors, agri-food, and digital technology.

As Australia ramps up its commitment to sovereign capability and global competitiveness, the future will be shaped by how well we design, govern, and deliver innovation precincts. In that future, Knight Frank is not just an advisor - we're a trusted delivery partner.

The Dutch innovation ecosystem – Why it is relevant for australia?

When Knight Frank selected the Netherlands as the focus of our 2025 study tour, it was a deliberate choice. We sought an ecosystem that was not only advanced and globally competitive, but also compact, coordinated, and relevant to Australia's scale and ambition.

This is a country of just 17 million people, yet it hosts:

- Over **3,000 innovative businesses,** including **400+ biopharma firms.**
- More than **300 high-tech companies** at High Tech Campus Eindhoven alone, employing **12,500+ researchers and engineers.**
- **215+ life sciences organisations** at Leiden BioScience Park, including **430 biotech firms.**
- **30,000 employees and 55,000 students** at Utrecht Science Park.
- **220+ companies** at Wageningen Campus, anchored by the world's top-ranked agricultural university.
- **70+ companies and 3,400+ employees** at NovioTech Campus, focused on semiconductors and healthtech.

The DNA of Dutch Innovation

At the heart of the Dutch model is the triple helix - the structured collaboration of government, academia, and industry - expanded into a quadruple helix that includes community. This is not accidental. It is institutionalised in governance, embedded in physical infrastructure, and reinforced by a culture of collaboration.

The Dutch approach is not limited to life sciences. It thrives on convergence: where AI, robotics, agri-food, digital, biotech, advanced manufacturing, and planetary sciences intersect. This vertical integration creates early critical mass, which is essential for moving from research discovery into translation, scale-up, and commercialisation.

What Success Looks Like

The Netherlands provides a condensed and integrated model of innovation. The metrics speak volumes:

- Bilthoven Biologicals produces 80% of the world's polio vaccines, anchoring the Netherlands' global health footprint.
- Utrecht Science Park operationalises the One Health model, integrating human, animal, and plant sciences with AI and digital infrastructure.
- 3,000+ innovative businesses - over 400 dedicated biopharma companies - in less than 1% of Europe's land area (a third smaller than Tasmania and roughly the size of the South East Queensland corridor).
- Six top-ranked universities, with more than 340,000 STEM students and 75,000 researchers nation-wide
- The country ranks #5 in the Global Innovation Index 2025 - ahead of Australia, and consistently in the top global tier.
- Hi Tech Campus Eindhoven - 300+ companies, 12,500+ jobs - directly contributes ~3% of Dutch GDP.
- Brainport innovation cluster alone as a whole delivers €32 billion in economic value annually (~3%+ of Dutch GDP) driven by high-tech manufacturing and ASML's global semiconductor supply chain.
- Wageningen "Food Valley" cluster hosts 220+ agri-food and life sciences businesses, global R&D for Unilever and FrieslandCampina, and is home to the world's #1-ranked agricultural university.
- The Netherlands files 21 patents per 100,000 residents yearly, second only to San Diego globally; its innovation output is 30% above the EU average.
- Leiden BioScience Park delivers the full value chain: 519 companies, 26,000 professionals, 27,000 students, and hosts Europe's largest gene and cell therapy and vaccine cluster.
- Cross-sector "deltas" connect medtech, biotech, food, and quantum/AI - now exporting €100 billion+ in high-tech and life sciences goods annually.
- Exits and success stories abound: Crucell (Johnson&Johnson vaccine, €1.75B), Uniqure (gene therapy, €2B), DSM spinouts, and 80+ scale-ups at Leiden alone.

These are not isolated wins.

They are the result of deliberate ecosystem design - where infrastructure, governance, and culture are aligned to support innovation.

The Itinerary

Our Dutch itinerary was carefully curated to showcase how different places combine the ingredients of innovation into working ecosystems.

These visits were not about admiring buildings - they were about understanding how governance, commercialisation scaling, infrastructure, partnerships, and research culture come together to generate national impact. What we observed repeatedly was that the real estate and physical infrastructure is only the starting point.

The true success of Dutch precincts lies in the way they curate ecosystems: mixing anchor institutions with SMEs, embedding housing and transport into the fabric of campuses, structuring land tenure to encourage investment, and positioning their identity through unique research outputs and even global “trivia” that makes their story memorable.



Amsterdam Science Park (Amsterdam)

- **Focus:** AI, data science, quantum, planetary sciences, material sciences, sustainability.
  - Anchored by the University of Amsterdam, co-located with data centres and scale-up firms.
- **Ecosystem curation:** Designed for “daily collisions” between disciplines - mathematics students, AI start-ups, and sustainability researchers working in the same square kilometre.
- **Trivia:** Home to one of the world’s largest **supercomputing centres,** supporting both climate modelling and drug discovery.



Leiden BioScience Park (Leiden)

- **Focus:** Europe’s top biotech cluster, with 400+ life sciences companies.
  - Anchored by Leiden University and major pharma firms
- **Infrastructure pathways:** Start-ups can move from shared wet labs → pilot plants → GMP manufacturing, all within the same park.
- **Land tenure:** Long-term leases give certainty for private capital and allow flexible redevelopment.
- **Trivia:** Leiden is where the first human monoclonal antibody was developed, setting the stage for global biopharma.



Central Innovation District (The Hague)

- **Focus:** Government, ICT, Cyber Security, legal and policy innovation.
  - Anchored by government, courts, and tech firms.
- **Transport:** Built directly around a major rail hub, ensuring daily flow of talent and visitors.
- **Housing:** Integrated student accommodation and apartments bring “life after hours” into what could otherwise be an office quarter.



NovioTech Campus (Nijmegen)

- **Focus:** Semiconductors, health tech, photonics.
  - Anchored by legacy firms from the electronics industry and Philips.
- **Land reuse:** Built on the former Philips industrial site, turning brownfield into high-value innovation.
- **Ecosystem design:** Flexible labs and maker spaces allow scale-ups to move quickly



Utrecht Science Park (Utrecht)

- **Focus:** Health, sustainability, regenerative medicine.
  - Anchored by Utrecht University and the world renowned University Medical Center.
- **Partnerships:** Strong hospital-university-industry model, enabling translational medicine at speed.
- **Housing and culture:** Student housing integrated into the park, creating a living-learning-working community.
- **Trivia:** Utrecht is home to one of the world’s most significant **fungus collections,** supporting discoveries in antibiotics and enzymes.



Wageningen Campus (Wageningen)

- **Focus:** Agri-food, bioeconomy, plant and animal sciences.
  - Anchored by Wageningen University, consistently ranked world No.1 in agriculture.
- **Ecosystem curation:** Corporates (Unilever, FrieslandCampina) sit alongside start-ups (including Australian start-up, Flavourtech) in shared pilot plants.
- **Global positioning:** Markets itself as the “Silicon Valley of Food.”
- **Trivia**: Home to one of the world’s largest **seed banks,** critical for global food security.

The Itinerary



High Tech Campus (Eindhoven)

- **Focus**
  Advanced electronics, smart pharma, deep tech.
  - Anchored by Philips, with hundreds of spinouts and corporates.
- **Critical mass**
  Known as “the smartest square kilometre in Europe.”
- **Trivia**
  As part of the Brainport cluster contributes ~3% of Dutch GDP through spinouts and supply chains.



Brainport Industries Campus (Eindhoven)

- **Focus**
  Industry 4.0, advanced manufacturing, robotics
- **Infrastructure**
  Massive flexible factory spaces designed for SMEs to test and scale without prohibitive capital outlay.
- **Public transport and logistics**
  Directly connected to highways and freight corridors





Biotech Campus (Delft)

- **Focus**
  Bio-based economy and industrial biotech.
  - Anchored by DSM (global science-based company).
- **Outputs**
  Home to industrial-scale fermentation facilities used to test biofuels and bioplastics
- **Trivia**
  Delft is where **yeast biotechnology was first industrialised,** underpinning global beer and enzyme industries.





Delft University of Technology (TU Delft)

- **Focus**
  Engineering, design, robotics, climate tech, aerospace.
  - Anchored by one of Europe's top-ranked technical universities, with 25,000+ students.
- **Ecosystem curation**
  TU Delft integrates education, applied research, and commercialisation on a single campus. Spinouts in drones, quantum computing, and sustainable aviation emerge directly from its labs
- **Infrastructure**
  Hosts the Yes! Delft incubator, ranked among the top university incubators globally, supporting 200+ start-ups in deep tech and engineering.
- **Housing and Culture**
  Purpose-built student and researcher accommodation within Delft creates a 24/7 living-learning-working environment.
- **Trivia**
  TU Delft researchers helped invent the **first practical microscope for nanotechnology** and are global leaders in quantum computers through the QuTech institute.

Dutch Science Park comparison matrix

Precinct	Anchor Institutions	Governance Model	Talent Pipeline	Infrastructure Type	Commercialisation Pathways	Sovereign Capability Contribution	Closest Australian Equivalent
Amsterdam Science Park	University of Amsterdam, CWI, AMOLF, SURFsara	Municipality + University partnerships; public land stewardship	UvA & AMS applied sciences; digital/AI skills	Supercomputing centre, quantum labs, AI hubs, data exchanges (AMS-IX)	Spinouts in AI, fintech, data platforms	Digital/quantum sovereignty; secure data infrastructure	Sydney Tech Central (data/AI), ANU Canberra (supercomputing/ quantum)
Leiden Bio Science Park	Leiden University, LUMC, Hogeschool Leiden	Mixed model: University + City + private investors (ASR, Kadans)	Hogeschool (vocational), Leiden Uni medical training, biotech PhDs	Biotech labs, incubators (BioPartner), scale-up GMP plants	Biotech start-ups → mid-cap → Janssen/ Pharma majors	Vaccine production (80% of world's polio vaccine), biotech pipeline	Parkville, Melbourne; Westmead, Sydney
Central Innovation District (The Hague)	TNO (applied research), Municipality of The Hague, Ministries	City-led governance with national ministries + TNO embedded	Urban universities + vocational training integrated	Policy labs, digital hubs, secure government R&D, urban testbeds	GovTech, mobility pilots, applied policy innovation	Defence/ cybersecurity resilience, governance innovation	Macquarie Park, Melbourne Central District, Tech Central
Utrecht Science Park	Utrecht University, UMC Utrecht, HU Hogeschool, Princess Máxima Centre	University + hospital + city partnership, with vocational embedded	Full spectrum: PhD to vocational; One Health embedded	Hospitals (6), labs, regenerative medicine centres, animal health hubs	Clinical trials, translational medicine, cross-disciplinary platforms	One Health (human-animal-plant convergence); oncology leadership	Herston/QUT/RNA, Brisbane; Randwick Health Precinct, Sydney
Wageningen Campus	Wageningen University & Research	University-anchored with Kadans + corporate R&D	Agri-food vocational training, PhDs, farmer engagement	Pilot plants, greenhouses, food labs, corporates (Unilever, FrieslandCampina)	Farm-to-lab-to-market integration; SME support	Global food resilience; plant/animal science; climate adaptation	Wagga Wagga (AgriPark); Toowoomba/Agtech Darling Downs; Townsville TropiQ, Food Innovation Precinct WA
Novio Tech Campus (Nijmegen)	Radboud University, HAN Hogeschool	Regional development agency (OostNL) + city + Kadans	Vocational Hogeschool + uni research pipeline	Health tech labs, semiconductor facilities, ICT accelerators	Health Valley + semiconductor cluster pathways	Semiconductor resilience + digital health	Tonsley Park, Lot Fourteen, Western Sydney Aerotropolis, Geelong (Advanced Manufacturing Precinct); Ferntree Business Park
High Tech Campus Eindhoven	Eindhoven University of Technology, Philips heritage	Privatised (Philips legacy → GIC Singapore ownership) with ecosystem curation	TU/e engineers + vocational (ROC colleges)	Nano-electronics labs, photonics fabs, smart materials centres	Philips spinouts, ASML scale-up, deep tech accelerators	Semiconductor sovereignty; ~5% Dutch GDP contribution	Tonsley Park, Lot Fourteen, Western Sydney Aerotropolis, Geelong (Advanced Manufacturing Precinct); Ferntree Business Park
Brainport Industries Campus	Brainport Development, TU/e, regional vocational colleges	Triple helix: Province, City, TU/e, industry consortium	Strong vocational integration (ROC), mid-tier skills	Industry 4.0 manufacturing halls, flexible factories	Shared IP/open innovation platforms for SMEs	High-tech manufacturing supply chain resilience	Tonsley Park, Lot Fourteen, Western Sydney Aerotropolis, Geelong (Advanced Manufacturing Precinct); Ferntree Business Park
BioTech Campus Delft (DSM/Planet B.io)	TU Delft, DSM-Firmenich, Planet B.io incubator	University + corporate + impact investor (ASR)	Biotech engineers, fermentation scientists, applied biotech programs	Industrial biotech plants, fermentation scale-ups, pilot facilities	Start-up to pilot plant → industrial scale-up	Biobased industrial biotech; fermentation sovereignty	Melbourne (Parkville Biotech + CSL); Adelaide BioMed City (industrial biotech), Macquarie Park, Brisbane Airport



Amsterdam Science Park



Leiden Bio Science Park



Central Innovation District (The Hague)



Utrecht Science Park



Brainport Industries Campus



Novio Tech Campus (Nijmegen)



Wageningen Campus



High Tech Campus (Eindhoven)



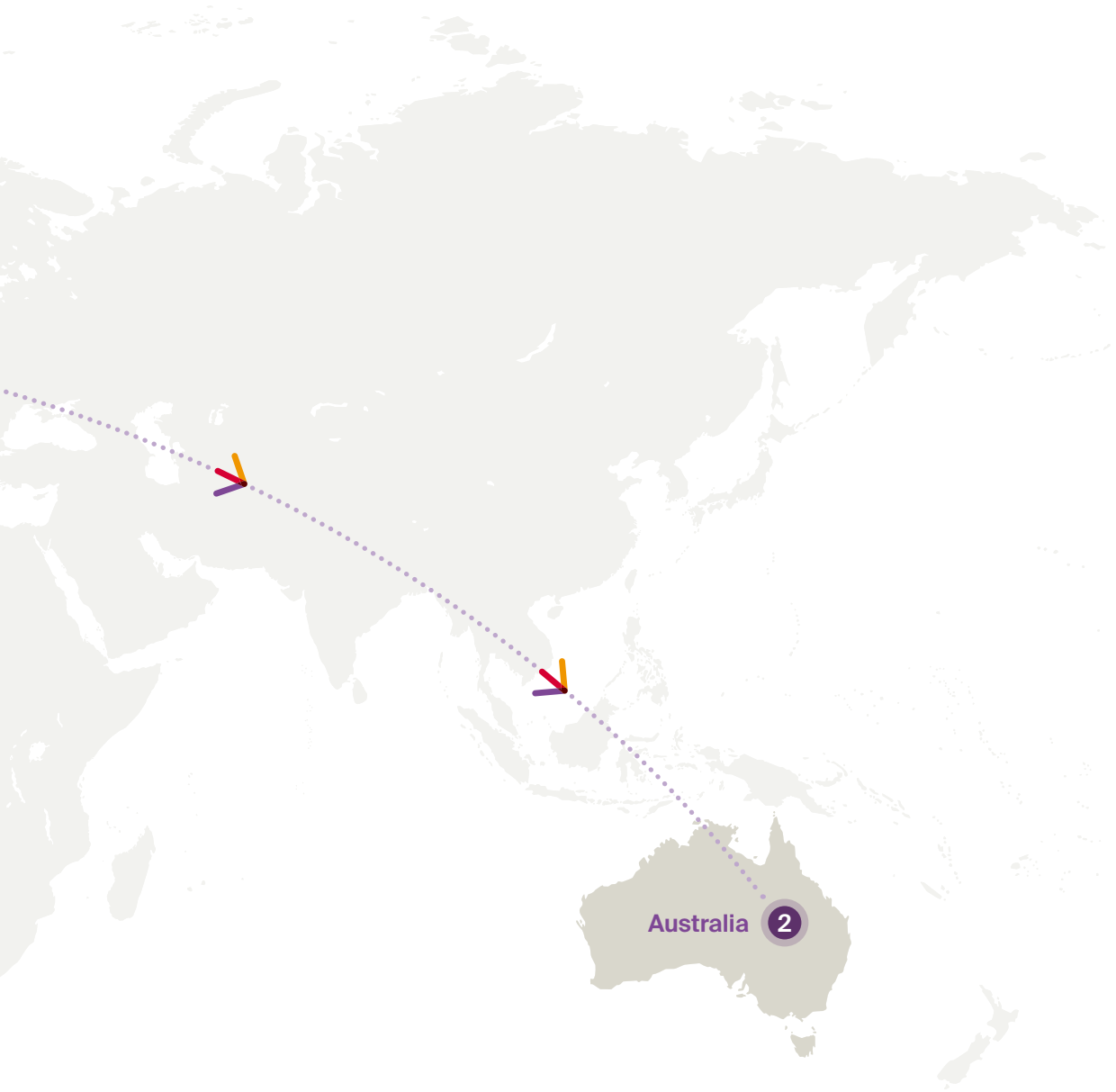
BioTech Campus Delft (DSM/Planet B.io)

Key themes and lessons learnt

The Netherlands Study Tour 2025 offered a rare opportunity to observe how a mid-sized country has systematically built globally competitive innovation precincts. Across sectors – from biotech and semiconductors to agri-food, and digital infrastructure – the Dutch model demonstrates that success is not accidental.

It is engineered through governance, infrastructure, talent, and long-term capital. This chapter distils those lessons into actionable insights for Australia, mapped directly to precincts where they can be applied.




Australia
2

Key themes and lessons learnt

Theme 1
Triple and Quadruple Helix Governance

Key Insight (What We Saw)

Governance in leading Dutch innovation precincts is not aspirational—it is operational, contractual, and embedded in the DNA of the ecosystem. At precincts such as Leiden BioScience Park, Brainport Industries Campus, and Utrecht Science Park, governance boards are structured to include representatives from government, academic institutions, industry, and either vocational education providers or the local community. This model reflects the triple helix (government–academia–industry) or quadruple helix (adding civil society or vocational education) approach to innovation governance.

These governance arrangements are not symbolic. Roles are formalised through contracts, and collaboration is embedded in partnership agreements. Boards are empowered with decision-making authority, including veto powers, to ensure that tenant mix, development priorities, and strategic direction remain aligned with the precinct's mission and sectoral focus.

Examples illustrate the impact of this governance model:

- **Brainport Eindhoven**
  A multi-actor governance structure underpins a high-tech cluster that contributes approximately €32 billion annually, representing around 3% of the Netherlands' Gross Domestic Product (GDP). This is a direct result of coordinated governance across public and private sectors.
- **Leiden BioScience Park**
  Governance aligns the interests of the university, hospital, city and provincial authorities, and private investors such as ASR Real Estate and Kadans Science Partner, creating coherence between research, real estate development, and business growth.
- **Central Innovation District (CID), The Hague**
  The municipality and province play a central convening role, embedding innovation into spatial planning and development frameworks, and aligning local governance with national innovation priorities.

These governance boards oversee a wide range of strategic and operational functions, including:

- Structuring and managing precinct partnership arrangements
- Curating tenant mix, often with veto rights to protect sectoral integrity
- Aligning funding streams and investment priorities
- Leading strategic planning and long-term visioning
- Protecting the precinct's brand and mission
- Overseeing development rights and land use decisions.

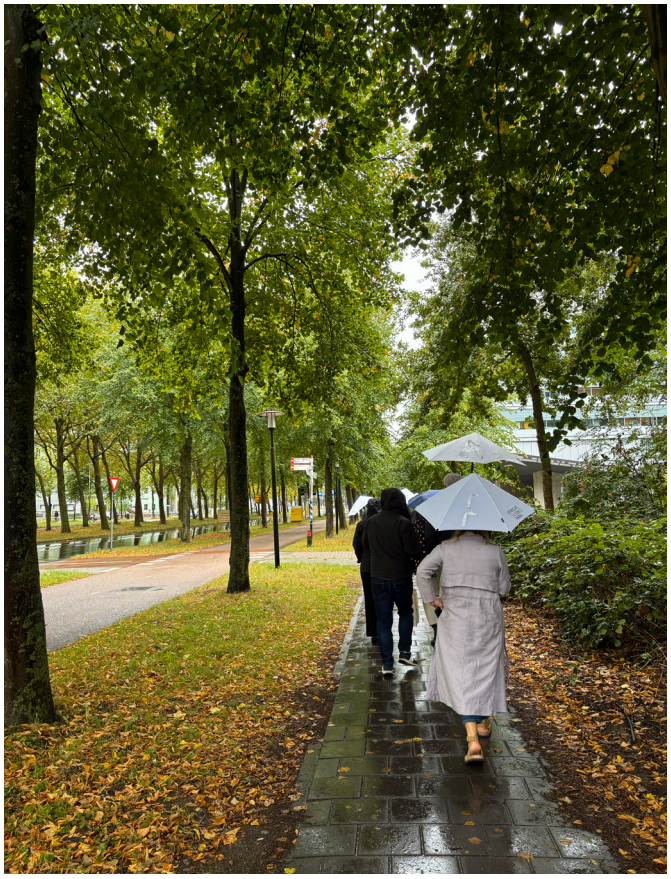
This governance architecture reduces fragmentation, fosters coherence, and significantly accelerates the translation of research into commercial and societal impact.

Australian Application – Why It Matters

In Australia, innovation precincts frequently default to governance models led by either government agencies or universities. While these actors are critical, such models often lack the integration of industry, commercial partners, vocational education providers, and community stakeholders. This can result in siloed decision-making, misaligned priorities, and slower pathways to impact.

The Dutch case studies demonstrate that deliberate, multi-actor governance—contractual, empowered, and inclusive—creates scale, resilience, and economic productivity. Embedding triple or quadruple helix governance in Australian precincts can:

- Strengthen strategic alignment across sectors and levels of government
- Accelerate the commercialisation of research and innovation
- Build trust and legitimacy among stakeholders, including investors and communities
- De-risk public and private investment by ensuring shared stewardship and accountability



Possible Actions / Implementation Strategies

To adapt and apply these insights within the Australian context, the following strategies are recommended:

1. **Formalise Governance Boards**
   Mandate the establishment of triple or quadruple helix governance boards for all precincts receiving federal or state support. These boards should have contractual roles and decision-making authority, ensuring that governance is not merely advisory but operational.
2. **Pilot Quadruple Helix Governance Models**
   Trial this governance approach in emerging precincts such as TropiQ in Townsville, Queensland, and FIPWA (Food Innovation Precinct Western Australia) in Mandurah, Western Australia, to test its effectiveness and scalability.
3. **Contractualise Collaboration**
   Embed collaboration obligations within partnership agreements, tenant onboarding processes, funding contracts, and land release conditions. This ensures that collaboration is not optional but foundational to precinct success.
4. **Empower Ecosystem Curation**
   Provide governance boards with veto rights over tenant selection and development partnerships to protect the precinct's sectoral focus and mission integrity. This enables active curation of the ecosystem rather than passive tenancy.
5. **Benchmark by Outcomes**
   Measure precinct performance using tangible metrics such as GDP contribution, job creation, and patent output. Aim for precincts to contribute 2–3% of regional GDP over time, mirroring the success of Brainport Eindhoven.
6. **Innovate Land Tenure Models**
   Use long-term ground leases or freehold divestments that include mission clauses and require governance participation as a condition for anchor tenancy or public funding. This aligns land use with strategic intent and ensures long-term commitment to the precinct's goals.
7. **Establish Precinct Offices**
   Create dedicated precinct offices with shared stewardship responsibilities and ecosystem curation rights. These offices should serve as operational hubs for governance, strategy, and stakeholder engagement, ensuring continuity and accountability.

Key themes and lessons learnt

Theme 2
Vocational and Applied Pathways

Key Insight (What We Saw)

In the Netherlands, vocational education is not treated as a peripheral or secondary component of innovation precincts—it is a strategic pillar. Across leading precincts such as Leiden BioScience Park, Brainport Industries Campus, and Wageningen Campus, vocational institutions including Hogescholen (universities of applied sciences) and MBOs (middelbaar beroepsonderwijs, or vocational colleges) are physically and operationally embedded within the innovation ecosystem.

These institutions play a critical role in supplying the technicians, operators, and mid-tier talent essential for commercialisation, scale-up, and industrial resilience. Their integration ensures that innovation precincts are not only research-rich but workforce-ready.

Examples from the Netherlands highlight this strategic integration

- At **Leiden BioScience Park,** Hogeschool Leiden delivers tailored training programmes that feed directly into the biotech sector, aligning curricula with the needs of local firms and ensuring a seamless transition from education to employment.
- At **Brainport Industries Campus,** approximately 500 vocational students are co-located daily with advanced manufacturers, enabling real-time learning, industry exposure, and immediate talent absorption.
- At **Wageningen Campus,** vocational pathways are co-designed with industry, resulting in a **96% graduate retention rate,** a powerful indicator of alignment between training and employment outcomes.

Vocational students are not peripheral—they are co-tenants, contributors, and future employees. Their presence on-site fosters real-time learning, talent visibility, and seamless transition into employment.

The Dutch model ensures not just a research pipeline, but a workforce pyramid—from world-class researchers to applied technicians—aligned with the needs of industry and national capability.



Australian Application – Why It Matters

In Australia, vocational education is often overlooked as a strategic partner in innovation precinct development. Institutions such as TAFE (Technical and Further Education) and applied research colleges are frequently treated as separate or secondary to the precinct core. This separation limits the development of integrated talent pipelines, slows the commercialisation of research, and disconnects training from real-world industry needs.

The Dutch model demonstrates that embedding vocational education into the governance and infrastructure of innovation precincts can:

- Strengthen talent pipelines for scale-up industries, ensuring that commercialisation is supported by a skilled and agile workforce.
- Improve the readiness of small and medium-sized enterprises (SMEs) to absorb and apply innovation, particularly in manufacturing, biotech, and digital sectors.
- Align vocational training with national goals for sovereign capability, including advanced manufacturing, health resilience, and food security.



Possible Actions / Implementation Strategies

To translate these insights into the Australian context, the following strategies are recommended:

1. **Formalise Partnerships**
   Position TAFEs and applied colleges as anchor tenants and governance partners within innovation precincts. This mirrors the role of Hogescholen in the Netherlands and ensures vocational institutions have a seat at the strategic table.
2. **Co-location Models:**
   Establish or relocate TAFE and equivalent facilities inside or adjacent to science parks, ensuring visible and functional integration. Co-location fosters collaboration, shared infrastructure, and real-time learning opportunities.
3. **Pilot Programmes**
   Trial co-governance and co-location of vocational institutions at select emerging precincts with scalable landholdings—such as TropiQ in Townsville, FIPWA in Mandurah, or AgriPark in Wagga Wagga—before scaling nationally.
4. **Tailored Curricula**
   Develop vocational pathways aligned with precinct specialisations. **For example:**
   - Biotech technicians in **Parkville, Melbourne**
   - Agri-food operators in **Toowoomba and the Darling Downs**
   - Digital and AI technicians in **Tech Central, Sydney**
5. **Talent Metrics**
   Benchmark vocational integration using metrics such as graduate retention rates, employment outcomes, and industry satisfaction. Aim for retention rates comparable to Wageningen's 90%+, demonstrating strong alignment between training and employment.
6. **Joint Governance Structures**
   Develop shared governance models between universities and vocational institutions, enabling coordinated planning, curriculum design, and infrastructure investment. This ensures that vocational and academic pathways are complementary, not competitive.

Key themes and lessons learnt

Theme 3
Critical Mass and Clustering

Key Insight (What We Saw)

In the Netherlands, innovation scale is not left to chance—it is strategically engineered. The most successful precincts and regional clusters deliberately build critical mass across companies, institutions, and talent to achieve global competitiveness and economic resilience.

These ecosystems are designed to reach a threshold where they become self-sustaining, attractive to international partners, and capable of driving national productivity.

Dutch exemplars demonstrate this principle in action:

- **Brainport Eindhoven** is a high-tech cluster comprising over 300 companies and more than 12,500 employees, anchored by ASML, Europe's largest semiconductor equipment manufacturer. The cluster contributes approximately €32 billion annually, equating to around 3% of the Netherlands' Gross Domestic Product (GDP) — a clear demonstration of the economic power of concentrated innovation.
- **Leiden BioScience Park** is Europe's largest biotechnology hub, hosting over 430 life sciences firms alongside Leiden University and the Leiden University Medical Centre. This density of research, clinical, and commercial activity creates a globally recognised biotech ecosystem.
- **Wageningen Campus** co-locates more than 220 agri-food companies with Wageningen University & Research, ranked as the world's leading agricultural university. This proximity enables seamless collaboration between academia and industry, accelerating innovation in food systems and climate adaptation.
- **Medical Delta,** spanning **Leiden, Rotterdam, and Delft,** integrates three cities into a single functional innovation system. It shows that clustering can be **regional and distributed,** not just confined to a single geographic precinct. Shared governance, branding, and infrastructure allow multiple sites to operate as one cohesive ecosystem.

These clusters are not merely geographic concentrations—they are curated ecosystems with shared infrastructure, governance models, and strategic branding. The Dutch model demonstrates that achieving minimum viable cluster density—typically hundreds of companies, thousands of jobs, and multiple anchor institutions—is essential for attracting talent, capital, and global partnerships.

This density drives visibility, investor confidence, and long-term resilience.

Australian Application – Why It Matters

Australia's innovation landscape is often fragmented, with precincts operating in isolation or competing for similar resources and attention. This fragmentation limits the ability to achieve scale, dilutes national and regional branding, and reduces the attractiveness of precincts to anchor tenants and international investors.

To compete globally, Australia must move beyond isolated precinct development and embrace deliberate clustering. Clusters should be integrated, not duplicated, and built around existing strengths and regional specialisations.

A well-designed cluster can:

- Create shared infrastructure and talent pipelines across institutions and sectors
- Reduce duplication and internal competition between precincts
- Strengthen sovereign capability through coordinated ecosystems
- Improve visibility and positioning in global innovation markets.



Possible Actions / Implementation Strategies

To translate these insights into the Australian context, the following strategies are recommended:

1. **Define Minimum Viable Scale**
   Use Dutch benchmarks as planning targets. Aim for clusters with 200 or more companies, 10,000 or more jobs, and multiple anchor institutions. This scale should be a prerequisite for major public investment and international positioning.

2. **Link Precincts Regionally**
   Replicate the Medical Delta model by integrating complementary sites into unified regional clusters.

   For example:

   - In South-East Queensland, link Boggo Road Innovation Precinct, Herston Health Precinct, and the Gold Coast Health and Knowledge Precinct into a single health and biotech corridor.
   - In Melbourne, integrate Parkville Biomedical Precinct, Arden Urban Renewal Precinct, and Fishermans Bend Innovation Precinct into a unified advanced manufacturing and life sciences cluster.

3. **Curate Company Density**
   Incentivise the presence of small and medium-sized enterprises (SMEs) and scale-ups, not just research institutions. A vibrant company base is essential for commercialisation, job creation, and ecosystem dynamism.

4. **Anchor Global Players**
   Attract and embed international anchor companies – such as ASML in Brainport or DSM – Firmenich in Delft – but only once the cluster has demonstrated proof of concept and local capability. Anchors should amplify, not define, the cluster.

5. **Measure Impact**
   Benchmark the GDP contribution of clusters. Australia should target 2–3% of state GDP from each major cluster within 10–15 years, aligning innovation investment with measurable economic outcomes.

6. **Develop Regional Cluster Frameworks**
   Create shared governance and investment logic across precincts within a region. This includes joint planning, funding alignment, and coordinated infrastructure development.

7. **Use Joint Branding and International Positioning**
   Develop unified branding strategies for regional clusters. For example, launch “Medical Delta Australia”, “AgriTech Corridor Queensland”, or “Advanced Manufacturing Victoria” to improve international visibility and attract global partnerships.

8. **Align Public Infrastructure Funding**
   Coordinate public investment across precincts to avoid duplication. Shared infrastructure—such as transport, digital connectivity, and testing facilities – should serve multiple sites within a cluster.

Key themes and lessons learnt

Theme 4
One Health and Convergence

Key Insight (What We Saw)

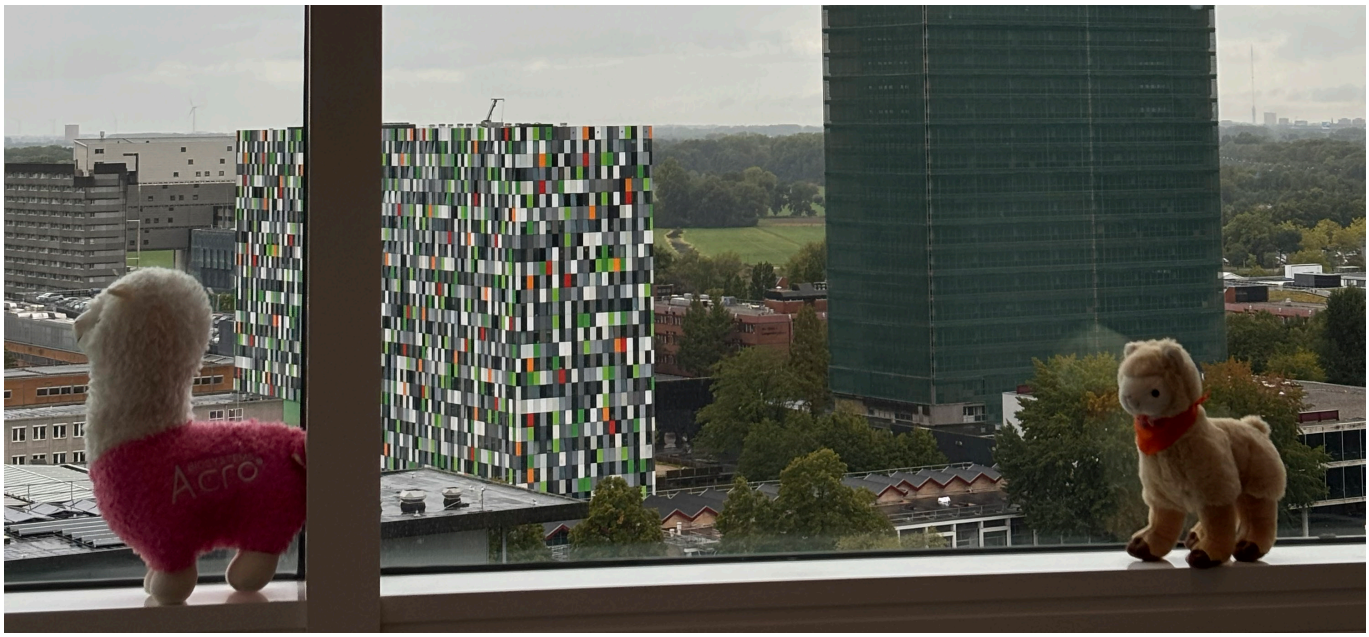
Dutch innovation precincts have moved beyond the language of multidisciplinary collaboration to deliver true “convergence”—the deliberate fusion of disciplines at both the governance and operational levels. This is a powerful competitive advantage on the world stage. Utrecht Science Park, for example, exemplifies this approach through its integrated One Health model. Research, training, and innovation intentionally cut across human health, veterinary science, plant biology, and environmental sustainability, with artificial intelligence and digital platforms acting as bridges between these domains.

Case Study

Perhaps no story better highlights this than the remarkable “llama case.” Utrecht Science Park leveraged its unique combination of animal health, veterinary research, and digital expertise to identify therapeutic nanobodies in llamas, translating this into global-impact diagnostics and therapies for infectious disease - including rapid COVID-19 diagnostic development during the pandemic.

This breakthrough was not incidental: the co-location of animal and human health researchers, joint access to clinical and animal trial infrastructure, and a culture of open data and project sharing created the fertile ground for serendipity and speed

Likewise, Wageningen Campus has transformed food, agriculture, and health convergence into a commercial engine. The campus is home to more than 220 enterprise partners and enjoys 96% graduate retention. It produces talent and new ventures by joining farmer engagement, corporate research and development, and next-generation nutrition science in one system. Delft University of Technology’s Biotech Campus fuses industrial biotechnology, sustainable fermentation, protein innovation, and climate research, turning convergent science into new market sectors.



Australian Application – Why It Matters

Australia has **world-class** assets across health, agriculture, agtech, veterinary science, climate science, and digital technologies. Yet, these often remain siloed by sector or institution. The Dutch case studies show that **cross-pollination is where scale and resilience emerge.** Convergence unlocks not only scientific breakthroughs but also globally distinct branding, investment attraction, and sovereign resilience.

Examples of Australian sites with latent potential:

- **Brisbane's Ecosciences Precinct (QLD)**
  Home to the Commonwealth Scientific and Industrial Research Organisation (CSIRO) and state agencies, this site could evolve into a One Health precinct linking agriculture, environment, and human health.
- **Australian Institute of Marine Science (AIMS) in Townsville**
  A national leader in tropical marine ecosystems, coral health, and marine biosecurity. AIMS could be embedded into TropiQ to create a marine–health–agtech convergence precinct, linking ocean health to food security and zoonotic disease surveillance.
- **Murdoch University (WA)**
  Already home to the Harry Butler Institute and the School of Veterinary Medicine, Murdoch could formalise a One Health precinct model focused on zoonotic disease, biosecurity, and agriculture–health integration.
- **CSIRO Oceans and Atmosphere**
  With capabilities in ocean modelling, fisheries, and marine genomics, CSIRO could partner with precincts like Brisbane's Ecosciences Precinct to integrate marine data into broader One Health frameworks.
- **Toowoomba / Darling Downs (QLD)**
  The University of Southern Queensland has strengths in agtech and veterinary science. Linking these with human health providers and environmental research could create a regional One Health hub.
- **University of Tasmania's Institute for Marine and Antarctic Studies (IMAS)**
  Positioned to lead in climate–marine–health convergence, especially in areas like seafood safety, ocean-borne pathogens, and polar biosecurity.

The lesson is that convergence is a choice. If Australian precincts remain siloed, they risk being outpaced by countries that deliberately design cross-sector ecosystems.



Key themes and lessons learnt

Theme 4
One Health and Convergence

Possible Actions / Implementation Strategies

To translate these insights into the Australian context, the following strategies are recommended:

1. Governance and Representation

- Encourage One Health integration in precinct governance structures. Boards should include representatives from human health, veterinary, agricultural, and environmental domains—not just universities and state governments.
- Adopt the Dutch model of contractual obligations for collaboration, ensuring convergence is embedded in partnership agreements and funding criteria.

2. Funding Alignment

Use vehicles such as the National Reconstruction Fund (NRF), the National Health and Medical Research Council (NHMRC), the Rural Research and Development Corporations (RDCs), and the Urban Precincts and Partnerships Program (uPPP) to incentivise cross-sector, One Health proposals.

3. Research-to-Market Pathways

Position Australian equivalents of Utrecht's "llama nanobody" discovery as high-profile case studies. Structured translational pathways should take discoveries from animal or plant research through to human application, vaccine development, and commercialisation.

4. Purposeful Cross-Disciplinary Pilots

- Establish dedicated pilot projects that strongly encourage collaboration across human, veterinary, and environmental health, underpinned by shared data platforms.
- For example, zoonotic disease preparedness hubs could combine veterinary science, public health, and AI predictive modelling.

5. Iconic Case Activation

Create "hero projects" that can act as narrative anchors for precincts—just as the llama case did for Utrecht. These might include fast-response diagnostics for zoonotic diseases, food-planet-health integration pilots, or climate-health biotechnology initiatives.

6. Talent and Infrastructure Investment

- Invest in reasonably flexible laboratories, simulation facilities, and cross-disciplinary digital platforms that allow human and veterinary researchers to collaborate in real time.
- Expand vocational pathways (TAFE and applied training) in biosecurity, veterinary nursing, agri-health data science, and bioinformatics.

7. Narrative and Branding

- Promote an "Australian llama story" equivalent by elevating existing or emerging breakthroughs in One Health.
- This narrative can be a magnet for talent and capital, reinforcing precincts as globally relevant, not just nationally important.

8. Digital Backbone

Ensure that AI, open genomic databases, and cross-disciplinary data platforms are treated as sovereign assets within precinct infrastructure.

9. Precinct Convergence Mandates

- Define One Health and convergence as explicit strategic objectives in state and regional precinct planning.
- Measure outcomes using cross-sector KPIs, such as the number of joint patents, translational trials, or collaborative start-ups spanning more than one sector.



Key themes and lessons learnt

Theme 5
Sovereign Capability

Key Insight (What We Saw)

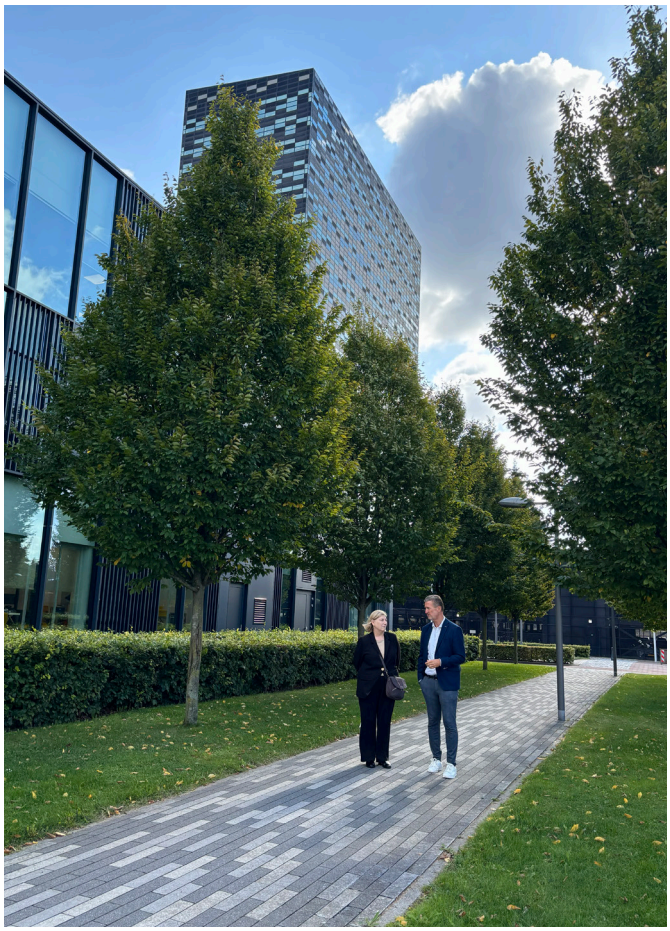
Dutch innovation precincts are not only economic engines—they are deliberately designed instruments of national resilience. Sovereign capability is not an afterthought; it is embedded into the mandates, infrastructure, and governance of these ecosystems.

These precincts anchor critical supply chains, ensuring that the Netherlands can respond to global disruptions, secure strategic industries, and maintain leadership in key sectors.

Examples of sovereign capability embedded in Dutch precincts include:

- **Bilthoven,** part of Utrecht Science Park, produces approximately 80% of the world's polio vaccine, making it a cornerstone of global health security and pandemic preparedness.
- **Brainport Eindhoven** anchors the semiconductor supply chain for Europe. It is led by ASML, a global leader in photolithography systems for chip manufacturing, valued at over €350 billion. The cluster contributes ~3% of Dutch GDP, demonstrating the strategic and economic significance of sovereign technology capability.
- **Delft and Planet B.io** drive industrial biotechnology and alternative protein innovation, positioning the Netherlands at the forefront of global food security and the green transition.
- **Wageningen Campus** is responsible for approximately 40% of Dutch food innovation exports, directly linking research and development to sovereign food capability and climate adaptation.

These case studies show that sovereign capability is not incidental—it is intentional, measurable, and embedded in the design and operation of innovation precincts.



Australian Application – Why It Matters

Australia's innovation precincts often prioritise research excellence, but underplay their potential role in sovereign supply resilience. In an era of geopolitical uncertainty, climate disruption, and global health threats, precincts must evolve into strategic national assets that secure Australia's capability in vaccines, biotechnology, semiconductors, agri-food, quantum technologies, and clean energy.



Several Australian precincts are well-positioned to take on sovereign roles:

- **Parkville Biomedical Precinct (VIC)** could consolidate Australia's vaccine and biotech manufacturing backbone, building on the presence of CSL, the Doherty Institute, and other clinical research leaders.
- **Sydney Tech Central (NSW)** presents an opportunity to anchor semiconductor and quantum technology manufacturing, leveraging the capabilities of UNSW, Sydney Nano, and CSIRO.
- **Townsville TropiQ (QLD)** has the potential to scale tropical health, biosecurity, and agri-tech capabilities into national and export supply resilience.
- **Boggo Road and Herston Precincts (QLD)** offer strong potential to secure biopharmaceutical manufacturing and clinical trial capacity as part of a broader sovereign health strategy.
- **Clayton Innovation Precinct (VIC)** is a candidate site for quantum technologies, semiconductors, and advanced manufacturing, anchored by Monash University, CSIRO, and private sector partners.

Possible Actions / Implementation Strategies

To embed sovereign capability into Australia's innovation precincts, the following strategies are recommended:

1. **Define Precinct Mandates for Sovereign Capability**
   Establish clear sovereign capability goals for each precinct. For example:
   - **Parkville**
     Vaccine production and biopharma resilience
   - **Clayton**
     Quantum and semiconductor manufacturing
   - **Townsville TropiQ**
     Tropical health and agri-food security
2. **Embed Manufacturing Infrastructure**
   Encourage precincts to include pilot-scale and full-scale manufacturing facilities, not just research laboratories. This enables translation from discovery to deployment and supports domestic production capacity.
3. **Establish Public–Private Governance Models**
   Replicate Dutch governance structures where government, industry, and academia co-govern precincts with shared key performance indicators (KPIs) focused on sovereign capability outcomes.
4. **Align Funding with Sovereign Capability Goals**
   Direct sovereign capability grants, National Reconstruction Fund (NRF) investments, and infrastructure funding into precincts with clearly defined national supply roles.
5. **Scale Agri-Tech Capability**
   Use the Wageningen model to scale Townsville TropiQ and Toowoomba's AgTech Hub into national food security assets, integrating research, vocational training, and commercialisation.
6. **Align with National Strategy and Defence Priorities**
   Position precincts as delivery vehicles for the National Reconstruction Fund, Defence Innovation Strategy, and Technology Investment Roadmap, ensuring alignment with national priorities.
7. **Attract Global Supply Chain Players**
   Secure international anchor companies—as ASML did for Brainport—to lift precinct visibility, connect to global markets, and embed Australia into strategic supply chains.

Key themes and lessons learnt

Theme 6
Data as Infrastructure

Key Insight (What We Saw)

In the Netherlands, data infrastructure is treated not as a peripheral IT function but as sovereign infrastructure—critical to national innovation, security, and competitiveness.

Dutch innovation precincts embed data platforms, artificial intelligence (AI) capabilities, and supercomputing into their foundational design, ensuring that digital assets are integral to precinct performance and not bolted on as afterthoughts.

Examples of sovereign capability embedded in Dutch precincts include:

- **Amsterdam Science Park** hosts AMS-IX (Amsterdam Internet Exchange), one of the world's largest internet exchanges, which carries over 10 terabits per second of traffic. It also houses SURFsara, Europe's fastest academic supercomputer, providing high-performance computing to researchers, start-ups, and industry.
- **Quantum Delta NL** is a €615 million national initiative that embeds quantum computing and digital infrastructure across multiple precincts. It treats quantum capability as a strategic national asset, not just a research frontier.
- **Open Protocols and Data Sharing**
  Several Dutch clusters mandate open intellectual property (IP) and data-sharing agreements to foster transparency, cross-sector collaboration, and accelerated innovation. These protocols enable SMEs, universities, and corporates to co-develop solutions without restrictive silos.

These digital assets underpin competitiveness across AI, life sciences, and advanced manufacturing, while also ensuring resilience in national digital sovereignty—the ability to control and secure critical data flows, computational capacity, and digital infrastructure.



Australian Application – Why It Matters

Australia has world-class research institutions and emerging precincts, but it lags in digital backbone integration. Data assets are often siloed by sector, institution, or geography, leaving precincts underpowered for global competitiveness.

Without embedded digital infrastructure, precincts struggle to support AI-driven research, bioinformatics, quantum experimentation, and scalable SME innovation.

To compete globally and ensure sovereign capability, data infrastructure must be embedded into precincts from inception—not as optional extras, but as core enablers of innovation, resilience, and economic productivity.

Strategic opportunities for Australia include:

- **Canberra (ACT)**
  The National Computational Infrastructure (NCI), housed at the Australian National University, could be positioned as a sovereign digital backbone, servicing science precincts nationally—not just academia.
- **Sydney Tech Central (NSW)**
  This district could embed quantum computing, AI platforms, and shared cloud/data infrastructure, ensuring that start-ups and SMEs have access to capabilities typically reserved for large corporates.
- **Western Sydney Aerotropolis (NSW)**
  As a greenfield site, it presents a unique opportunity to design AI, quantum, and open data infrastructure from the outset, avoiding the cost and complexity of retrofitting.
- **Parkville Biomedical Precinct (VIC)**
  Requires shared bioinformatics and genomic data platforms to mirror the integrated life sciences informatics approach seen in Leiden and Utrecht, enabling precision medicine and translational research.

Possible Actions / Implementation Strategies

To embed data infrastructure as a sovereign capability within Australian precincts, the following strategies are recommended:

1. **Recognise Data as Core Infrastructure**
   Treat data platforms, AI capacity, and high-performance computing as sovereign infrastructure. Embed them into all major precinct strategies, with dedicated investment and governance—not as peripheral IT services.
2. **Create Shared Data Trusts**
   Replicate Dutch models of open IP and data-sharing agreements to encourage collaboration between universities, SMEs, and corporates. These trusts should be governed by transparent protocols and aligned with national privacy and security standards.
3. **Digitally Link Precincts**
   Connect precincts such as Parkville, Tech Central, and Boggo Road via national digital platforms tied into the National Computational Infrastructure, creating a federated precinct network that enables distributed innovation.
4. **Mandate Integration in Greenfield Precincts**
   Require quantum computing, AI infrastructure, and data platforms to be embedded from the outset in precincts like Sydney Aerotropolis and Townsville TropiQ, avoiding the inefficiencies of retrofitting.
5. **Benchmark Value Creation Through Digital Metrics**
   Measure precinct performance not just by traditional metrics like patents or job creation, but by data throughput, AI use-cases, and the number of companies accessing shared platforms. These are the metrics where Amsterdam leads globally and where Australia must improve.

Key themes and lessons learnt

Theme 7
Open Innovation and Transparency

Key Insight (What We Saw)

Dutch innovation precincts set a global benchmark for open innovation and operational transparency, transforming them into vibrant, high-performing ecosystems.

At Planet B.io in Delft, the very structure of tenancy, infrastructure, and community cultivates an environment where cross-company and cross-sector collaboration is the expectation and the norm. Planet B.io's achievements are backed by data: over 70 percent of tenant projects are collaborative, a level of integration rarely matched elsewhere.

High Tech Campus Eindhoven, renowned as "Europe's smartest square kilometre," brings together more than 300 companies and 12,500 innovators, all operating within a system designed to share ideas, knowledge, and even physical spaces.

The model is not dependent on mandates for sharing intellectual property—rather, transparency and openness are baked into how tenants lease space, how precincts are governed, and what programming takes place on site. Shared demonstration facilities, glass-walled laboratories, and routine "demo days" make research and development visible to investors, prospective partners, and the public.

At Brainport Industries Campus, flexible production spaces and open pavilions enable rapid co-development for smart manufacturing. The Central Innovation District in The Hague is a prime case of how blending academia, government, and business in a mixed-use setting can power public-private policy and digital innovation.

Importantly, precincts like Leiden Bio Science Park report concrete benefits: after introducing formal openness clauses, there was a 40 percent annual increase in inter-company projects, expanding both local clusters and international value chains.

Australian Application – Why It Matters

Australian innovation precincts often advertise collaboration but struggle to make it operational. Shared lab spaces and co-working models exist, but there are few formal mechanisms that contractually embed openness into governance, tenancy, or precinct culture. The risk is that Australian precincts evolve into "closed labs" where research excellence is celebrated but remains disconnected from industry adoption and public benefit.

The Dutch experience demonstrates that open innovation is most powerful when designed into the system itself—through tenancy agreements, governance mandates, shared infrastructure, and visible programming. This is particularly important in an Australian context where public trust, sovereign capability, and patient investment all depend on transparency of outcomes.



- **Accelerate commercialisation** by making research visible and accessible to SMEs, corporates, and investors.
- **Attract capital and talent** by showcasing tangible collaboration outcomes rather than abstract promises.
- **Strengthen precinct legitimacy** by engaging community stakeholders and demonstrating public benefit.

Possible Actions / Implementation Strategies

To embed open innovation and transparency into Australian precincts, the following strategies are recommended:

1. **Introduce tenancy innovation clauses**
   Require leases and licences in precincts to include obligations for collaborative activity—shared use of laboratories, participation in precinct showcases, or data-sharing arrangements.
2. **Mandate openness in governance frameworks**
   Embed collaboration and transparency obligations into partnership agreements, governance charters, and funding contracts, ensuring boards have responsibility for curating—not just encouraging—open innovation.
3. **Institutionalise demo days and showcases**
   Replicate quarterly open innovation showcases across Australian precincts, making progress visible to investors, community stakeholders, and government funders.
4. **Measure collaboration as a key performance indicator (KPI)**
   Track and publish metrics such as the percentage of cross-tenant projects, joint patent filings, or shared grant applications, positioning openness alongside jobs and GDP as measures of success.
5. **Design for visibility**
   Use physical design—glass-walled laboratories, transparent workspaces, public demonstration hubs—to make innovation visible to communities, talent, and capital markets.
6. **Create precinct-wide partnership pacts**
   Develop “open innovation compacts” signed by all tenants, similar to corporate sustainability pledges, formalising expectations around collaboration, transparency, and shared use of facilities.
7. **Curated precinct programming**
   Establish structured calendars of cross-tenant hackathons, joint R&D sprints, and open-access lecture series. Utrecht’s One Health showcase weeks and Brainport’s public innovation expos provide models for activating ecosystems.
8. **Appoint innovation stewards within precinct offices**
   Ensure governance boards include dedicated innovation managers whose role is to curate openness, manage shared infrastructure, and enforce collaboration standards.



Key themes and lessons learnt

Theme 8
Long-Term Investment Logic

Key Insight (What We Saw)

Dutch science and innovation precincts benefit from a culture of patient, strategic investment led by deep-pocketed institutional capital, notably from players such as ASR Real Estate and Kadans Science Partner. These investors structure their participation around 20–30 year horizons, not short-term speculative yields.

In this ecosystem, the return on investment is measured not merely in rental income but in sustained uplift to national gross domestic product, resilience of innovation systems, and the growth of mature, globally connected ecosystems. Fund structuring explicitly favours clusters and precincts over one-off property assets, and adheres to a risk-balanced “85/15” rule—where 85 percent of investment is placed in stabilised, income-producing assets, and 15 percent is allocated to high-potential or start-up exposure.

ASR Real Estate, for example, has committed hundreds of millions of euros to new infrastructure at the Biotech Campus Delft—including long-term funding for new headquarters, laboratories, and shared facilities with leasebacks of up to 20 years. These investments are backed by participation in precinct governance boards, tying capital directly to ecosystem stewardship and mission achievement.

Kadans Science Partner operates similarly at other campuses, focusing on curating talent-rich, multi-tenant clusters and securing long-term relationships with anchor and SME tenants for sustainable growth.

International capital is similarly patient. The **Government Investment Corporation (GIC)** of Singapore’s €600 million refinancing of High Tech Campus Eindhoven—the anchor of the Brainport cluster—was predicated on a 25-year asset plan with expectations of financial and strategic returns at the European scale. By prioritising precinct curation, tenant mix, and ecosystem health over rapid asset turnover, the Dutch approach has delivered outsized national dividends. Brainport alone now contributes approximately 3 percent of Dutch gross domestic product each year, underscoring that when long-term capital is twinned with ecosystem curation, entire national industries and capabilities are strengthened.



Australian Application – Why It Matters

Australia's property and institutional capital markets have, by and large, maintained a preference for short-term yield and asset sales, amplified by election-cycle public investments. This often leaves science, research, and medical precincts fragmented, under-resourced, or treated as mere real estate deals rather than national capability platforms.

There is a need for a fundamental pivot: to unlock the full sovereign impact of precincts, Australia's $3.5 trillion superannuation pool and the National Reconstruction Fund capital must approach these assets as generational, nation-building infrastructure—akin to ports, utilities, or airports—worthy of multi-decade patient capital.

- **The National Reconstruction Fund,** as it evolves, should orient its terms and investment cycles to at least 20-year horizons, co-investing with institutions and targeting not just monetary return, but sustainable job creation, science translation, and industry resilience.
- **Superannuation funds,** while significant in size, have rarely invested at the scale or duration seen in Dutch models. Yet these funds are ideal candidates for long-duration, inflation-hedged precinct assets—delivering stable national returns and driving long-term productivity and resilience.



Possible Actions / Implementation Strategies

To embed long-term investment logic into Australian precinct development, the following strategies are recommended:

1. **Precinct Investment Trusts**
   Develop pooled vehicles—such as Real Estate Investment Trusts (REITs) or hybrid debt/equity funds—dedicated to precinct-wide assets, not single buildings. This allows investors to benefit from ecosystem value creation, rather than isolated asset performance. Pre-leasing models can be used to balance risk, ensuring SMEs and start-ups have access while stabilised anchors provide long-term income.
2. **NRF Co-Investment Models**
   Position the National Reconstruction Fund as the senior limited partner within these vehicles, de-risking institutional participation. Pair NRF capital with state governments and superannuation funds to build a layered capital stack with aligned 20+ year horizons.
3. **Ecosystem KPI Reporting**
   Adopt Dutch-style reporting that measures success by GDP contribution, job creation, patent density, export revenue, and supply chain resilience. This reframes innovation real estate as a sovereign asset class akin to ports, rail, or energy infrastructure.
4. **Policy Recognition**
   Governments at all levels should treat innovation precinct infrastructure as critical economic infrastructure, unlocking concessional finance, credit guarantees, and planning incentives to attract private capital.
5. **Superannuation Fund Engagement**
   Position precinct investments to superannuation trustees as long-duration, inflation-hedged assets with stable cashflows, ESG alignment, and measurable sovereign impact. This reframing can shift perception from "venture risk" to "nation-building stability.

Key themes and lessons learnt

Theme 9
Applied Research Backbones – TNO vs CSIRO

Key Insight (What We Saw)

In the Netherlands, applied research is not peripheral—it is central to precinct performance and national innovation strategy. The Netherlands Organisation for Applied Scientific Research (TNO) plays a pivotal role in bridging fundamental research and commercial application. With approximately 3,800 staff and an annual turnover of €1 billion, TNO operates across multiple domains including defence, health, energy, and digital technologies.

TNO is not simply a grant partner or external collaborator. It is physically embedded and institutionally integrated into Dutch innovation precincts. Within these ecosystems, TNO acts as a translational engine, facilitating intellectual property (IP) transfer, managing pilot funding, and scaling public–private research and development (R&D) programmes.

Importantly, TNO may also hold operational roles in precinct governance where it's appropriate. This ensures that applied research is not only aligned with industry needs but also actively drives commercialisation and SME (small and medium-sized enterprise) engagement.



Australian Application – Why It Matters

Australia has world-class applied research institutions, including the Commonwealth Scientific and Industrial Research Organisation (CSIRO), the Australian Institute of Marine Science (AIMS), and the Australian Nuclear Science and Technology Organisation (ANSTO).

These agencies possess deep scientific expertise and infrastructure, but their integration into precinct-level operations is inconsistent and often limited to national grant administration or project-based partnerships.

This disconnect means that Australia's applied research backbone is under-leveraged in driving precinct performance, SME engagement, and translational impact. Embedding these agencies into precinct governance and operations—mirroring the TNO model—could catalyse commercialisation, accelerate sovereign capability development, and improve the return on public research investment.

Possible Actions / Implementation Strategies

To adapt the Dutch model to the Australian context, the following strategies are recommended:

1. **Embed Applied Research Organisations in Precinct Governance**
   Move beyond symbolic partnerships. Ensure that CSIRO, AIMS, and ANSTO have board representation and operational roles in selected precincts, where it is appropriate. This will allow them to influence strategy, funding allocation, and tenant curation.
2. **Co-locate Applied Researchers with SMEs and Scale-ups**
   Physically embed CSIRO scientists, IP managers, and translational leads within precincts, not in separate campuses. Co-location fosters real-time collaboration, accelerates problem-solving, and improves SME access to expertise.
3. **Pilot Translational Programmes**
   Establish pilot sites for TNO-style public–private translational funds, pilot plant programmes, and applied R&D accelerators. These should be precinct-based and focused on sectors of national priority such as biotech, critical minerals, energy, and agri-food.
4. **Measure Contribution by Translation Metrics**
   Shift performance benchmarks from research output (e.g. publications) to translation metrics such as IP licensed, SMEs supported, pilot projects funded, and commercial partnerships formed.
5. **Strategic Alignment with Sovereign Capability Goals**
   Position applied research organisations as sovereign enablers for national priorities. For example:
   - **CSIRO** in vaccine development and biomedical engineering at Parkville, Melbourne
   - **CSIRO and ANSTO** in semiconductor and quantum technologies at Tech Central, Sydney
   - **CSIRO and AIMS** in agri-tech and marine innovation at Townsville and Toowoomba
6. **Develop Precinct-specific Mandates**
   Create precinct-level key performance indicators (KPIs) for CSIRO units focused on SME engagement, IP commercialisation, and translational outputs. This ensures accountability and alignment with local ecosystem goals.
7. **Align Funding Models with Precinct Integration**
   Redirect pilot funds and translational grants through embedded CSIRO units, mirroring TNO's precinct-based funding model. This will ensure that funding flows are aligned with precinct priorities and commercialisation pathways.



Key themes and lessons learnt

Theme 10
Storytelling Anchors Value

Key Insight (What We Saw)

One of the most striking lessons from the Netherlands is that **every successful innovation precinct carries a clear, measurable, and authentic narrative.** Storytelling is not treated as marketing spin or a colourful masterplan—it is embedded in strategy, reinforced by metrics, and repeated consistently across governance, branding, and international promotion. This narrative is built around the reality of what the precinct actually achieves, not simply what it aspires to be.

Utrecht Science Park is globally recognised as a **"One Health"** powerhouse, weaving together human, animal, environmental, and increasingly, marine science—an identity visibly reinforced by pioneering breakthroughs such as the llama nanobody story and by integration of animal, clinical, and digital domains.

Brainport Eindhoven positions itself as Europe's capital for semiconductors and advanced manufacturing, contributing an extraordinary 3–5% of the Netherlands' gross domestic product each year. The **"Brainport"** brand is backed by a vibrant ecosystem of thriving technology businesses, acclaimed alumni ventures, and measurable export volumes.

Amsterdam Science Park is branded as Europe's home of data sovereignty, built on foundational assets like the Amsterdam Internet Exchange (**AMS-IX**)—the world's largest internet exchange—backed by actionable metrics, continual international benchmarking, and deep digital infrastructure.

High Tech Campus Eindhoven markets itself as **"the smartest square kilometre in Europe,"** substantiated by its 12,500 employees, more than 300 companies, the launch of global leaders like ASML, and a culture that openly showcases its alumni and start-up stories.

The Dutch approach demonstrates that a compelling narrative, when built on evidence and lived experience, is institutionalised throughout the ecosystem—engraved in physical space (murals, Wall of Fame installations), mirrored in recruitment and outreach, and reified by consistent public reporting of patents, jobs, and scale-up performance. These narratives are sticky, repeated locally and globally, reinforcing each precinct's differentiation and enduring relevance.

Australian Application – Why It Matters

In Australia, too many precincts still define themselves through urban design, masterplans, or aspirational slogans rather than authentic, evidence-based narratives. While these are important, they do not substitute for a clear, evidence-based narrative that communicates global distinctiveness and strategic relevance.

This lack of clarity creates several risks:

- **Investors** see limited differentiation, making it harder to attract long-term capital.
- **SME, talent and students** do not identify strongly with the precinct identity, weakening retention.
- **Government policy and funding** are harder to secure without a clear narrative that links to national capability and economic resilience.

The Dutch experience shows that precinct narratives only succeed when they are authentic and measurable. This means tying stories directly to tangible assets (e.g., a globally significant facility), breakthrough research (e.g., the llama nanobody), or economic impact (e.g., GDP contribution). Done well, storytelling becomes a powerful tool for investment attraction, talent recruitment, and international positioning.

Possible Actions / Implementation Strategies

To embed storytelling as a strategic asset in Australian precinct development, the following actions are recommended:

1. **Narrative Development**
   Facilitate collaborative workshops with universities, industry, government partners, SME tenants, alumni, and community stakeholders to articulate each precinct's real point of difference, ensuring convergence themes (such as digital, health, marine science, or manufacturing) are centre stage and can be verified by measurable outcomes.
2. **Build Metrics into Storytelling**
   Link precinct brands to measurable indicators such as patent density, company formation rates, venture capital raised, or GDP contribution. Example: replicate the High Tech Campus model, where "the smartest square kilometre" brand is credible because it is backed by employment, diversity, and export data.
3. **Celebrate Alumni and Spinouts**
   Make entrepreneurs, alumni ventures, and successful start-ups visible as ambassadors of the precinct story. Publicly celebrate case studies and highlight global success stories originating from the precinct.
4. **National Storytelling Framework**
   Develop a coordinated national framework for precinct storytelling, ensuring that stories are complementary, not competitive. For example, Sydney Tech Central could own the digital/data story, Parkville the biomedical narrative, and Townsville TropiQ the tropical health and agtech brand—together projecting Australia's broader sovereign capability.
5. **Public Engagement and Transparency**
   Incorporate public showcases, open innovation labs, and digital storytelling platforms to reinforce visibility and authenticity. Create precinct-wide events where investors, researchers, students, and the community can engage with innovation in a tangible way.
6. **Living the Brand**
   Translate storytelling into the physical environment through "walls of fame", murals, public exhibits, and curated innovation showcases. Ensure the narrative is consistently reflected in recruitment campaigns, tenant attraction materials, and investor presentations.
7. **Key Performance Indicators (KPIs) and Reporting**
   Publicly release annual metrics such as jobs created, patents filed, new company registrations, SME participation, and export volume. These metrics anchor the narrative in credibility, making the precinct attractive to both investors and policymakers.
8. **Culture of Consistency and Visibility**
   Sustain the storytelling effort over years and multiple precinct leadership cycles, ensuring stories remain fresh but rooted in the precinct's evolving achievements.



Key themes and lessons learnt

Theme 11
Build on What Already Exists

Key Insight (What We Saw)

Dutch innovation ecosystems thrive because they double down on proven strengths rather than chasing speculative trends or untested technologies. This approach fosters resilience, credibility, and translational depth, allowing precincts to grow organically through layered partnerships, alumni networks, and long-term investment.

Rather than building from scratch, Dutch precincts scale from existing research excellence, industrial heritage, and sectoral specialisation. Their success is rooted in authenticity and continuity, not novelty for novelty's sake.

Examples include

- **ASML,** now Europe's most valuable technology company with a market capitalisation exceeding €250 billion, emerged from Philips spinouts in Eindhoven. Its rise was anchored in decades of semiconductor research and development (R&D) and a deep regional talent pool.
- **Wageningen Campus** leveraged its position as the world's top-ranked agri-food university to attract over 220 companies and now supplies approximately 40% of Dutch agri-food innovation exports. Its success is built on academic depth and industry alignment.
- **Leiden BioScience Park** scaled from Leiden University's biomedical research base, now hosting more than 430 life sciences companies. It contributes directly to national GDP and sovereign vaccine security, including production of 80% of the world's polio vaccine.
- Across the Netherlands, **80% of university spinouts** report emerging from established research domains, not from speculative or "bleeding edge" technologies. This reinforces the value of building on existing strengths.

Australian Application – Why It Matters

Australia has an extraordinary base of capabilities across both metropolitan and regional centres—yet too often resources are dispersed across new "greenfield" precincts that lack sufficient anchor institutions or sectoral depth. While new precincts are politically attractive, they frequently fail to achieve critical mass because they are not anchored in the strengths that already exist.

The experience of the Netherlands demonstrates that critical mass and resilience are most effectively achieved by building upon established strengths—such as local research excellence, industrial heritage, sectoral expertise, and alumni achievements.

These foundational assets foster credibility with investors, support sustainable talent pipelines, and position innovation precincts for expansion beyond national boundaries.

For Australia, this means recognising that regions like Townsville (tropical health and agtech), Wagga Wagga (agri-food), and Tonsley (advanced manufacturing) already possess globally relevant assets. Rather than importing models or chasing the next hype sector, the path to global competitiveness lies in scaling these authentic capabilities.

Possible Actions / Implementation Strategies

To embed this principle into Australian precinct development, the following strategies are recommended:

1. **Map Strengths and Alumni**
   Conduct systematic audits of regional and urban strengths—covering workforce skills, research outputs, anchor employers, and alumni ventures. For example, Newcastle should benchmark its global energy transition research footprint, while Townsville should map its tropical health alumni base and regional supply chains.
2. **Prioritise "Stacked" Growth**
   Focus new cluster or real estate investment where there is already sustained talent, skills, and R&D depth. Link incentives or expansion funding to demonstrated workforce volume, graduate retention rates, and employer demand, similar to Wageningen's 96 percent graduate retention rate.
3. **Spinout and SME Platforms**
   Develop programs to scale spinouts and SMEs (small and medium enterprises) with direct access to existing anchors and alumni mentors. The Philips-to-ASML pipeline in Eindhoven demonstrates how corporate anchors can generate enduring global businesses when spinouts are strategically supported.
4. **Narrative as Proof**
   Ground precinct branding in real achievements—export successes, patents, alumni companies—rather than in aspirational slogans. Position Geelong as an advanced manufacturing hub by showcasing its Deakin University composites research, or Wagga Wagga as a food resilience precinct by highlighting existing agri-food innovation exports.
5. **Tie Investment to Proof Points**
   Require new precinct proposals to demonstrate explicit linkages to existing talent pools, anchor institutions, and proven R&D bases. This avoids duplication and ensures funding aligns with areas of genuine comparative advantage.
6. **Long-Term Partnerships**
   Secure continuity between research institutions, local government, and industry so that universities and vocational institutions are permanent precinct anchors—not transient "partners." Embed governance structures where universities, TAFEs, and industry share long-term stewardship, reflecting the Dutch quadruple helix model.



Closing Reflections

From Lessons to Leadership

This report stands as both a reflection of the depth and nuance uncovered during the Dutch study tour, and a forward-looking roadmap for the future of innovation precincts in Australia.

The lessons captured here show that precinct success is not the product of chance or design flair alone – it is engineered through governance, long-term capital, vocational integration, ecosystem curation, and cultural alignment.

Knight Frank's approach is distinct. We combine strategic thought leadership, on-ground market immersion, and a relentless focus on actionable execution – a blend that consistently translates global insights into genuine precinct outcomes. We are not passive observers of innovation; we are active partners connecting research with real estate, policy with property, and vision with delivery.

The insights in these pages are deliberately framed to be cited, challenged, and applied by government, universities, capital providers, and industry leaders. This report is designed as a quotable reference: a tool for shaping policy, guiding investment, supporting advocacy, and benchmarking impact in a new era of precinct-led innovation and capability-building.

Above all, this is a call to collaboration. The opportunities and challenges that lie ahead will not be solved by one institution or one sector alone. They demand open dialogue, shared knowledge, and collective ambition.

Knight Frank welcomes the chance to partner, advise, and present these findings further as Australia designs and delivers the next generation of globally competitive precincts.

Knight Frank Australia is proud to be positioned as the go-to advisor for innovation precinct strategy, delivery, and ecosystem optimisation. We invite all stakeholders to work with us to turn these insights into enduring economic, scientific, and social impact.



Key Statistics

9 science parks and innovation precincts

3,000+ Innovative businesses in a country of just 17 million people, including 400+ biopharma organisations

Hosts Europe's largest gene and cell therapy and vaccine cluster

Brainport Cluster (Eindhoven)

Contributes €32 billion annually (~3% of Dutch GDP)

Patent Power

The Netherlands files 21 patents per 100,000 residents yearly, second only to San Diego globally. Innovation output is 30% above EU average

Global Ranking

The Netherlands ranks #8 in the Global Innovation Index 2025, ahead of Australia at #22

Export Strength

Cross-sector clusters export €100 billion+ in high-tech and life sciences goods annually

Talent Pipeline

Six top-ranked universities, 340,000 STEM students, and 75,000 researchers nationwide

Despite its small size, The Netherlands has engineered world-leading innovation ecosystems, making it a global benchmark for turning research into economic and societal impact.

Acknowledgements

Connecting and reflecting

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