Benchmarking The Hague

November 2023

The Business of Cities

Benchmarking The Hague

1. Summary
2. The Hague in global context
3. The Hague's visibility, performance and perception
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1. Summary

The Business of Cities

Benchmarking The Hague along its journey

1st cycle (2000-2012)

1

ICC role established.

Government & Diplomacy.

Higher Education. Congresses. Meeting place of the world.

Neighbouring cities build their identity boldly and assertively.

Push to diversify economy.

2nd cycle (2013-2020)

2

City of Peace and Justice.

Renewed Brexit advantage.

Push to grow the innovation and enterprise system.

Human-scale liveability.

New destination development.

Visitor economy.

Momentum in GovTech, Cyber, Health.

Symptoms of unaffordability and congestion.

3rd cycle (2021-)

3

Build the unique personality.

Global problem-solvers.

Experience, pride, participation and civic connection.

Recognised specialisms.

Defining the growth model with the region.

The Hague's story is one of leadership, specialisation, adaptation, connectivity and borrowed scale through its relationships with a unique surrounding 'system' of cities.

The Hague is now:

- Among the top 50 small-medium cities in the world* in its own right
- Unique for its depth of HQ hub functions
- A recognised centre of innovation in key impact industries.
- Part of the best connected region of complementary cities in the world.

The key questions are:

?

1. How and where does The Hague stand out?
2. Does The Hague leverage successes and escape stereotypes from previous cycles?
3. What should The Hague's strategic and communications priorities be?

*Among cities <1.5m

Why this work? Why now?

The Hague's identity is shaped by the post-pandemic reset, geopolitical shifts and changes in the ways cities are judged and compared. It is important to understand how the world sees The Hague.

There are at least 3 important factors that shape how the world sees The Hague. Each has important implications for this work:

What it means for The Hague

1. **The Hague's special geographical context.** The Hague is a medium-sized high quality of life city that is also part of a much larger and highly inter-connected region (the Randstad). The Hague is not a separate place. Instead it shares assets with these other cities, provides complementary specialisations, and gains borrowed scale from their proximity.

Businesses and prospective investors often view The Hague as part of a single catchment, a single opportunity for real estate, and a single integrated labour and talent market.

The Hague has to work harder to reveal its unique assets and attributes.

The Hague has to be mindful of the different scales at which to communicate its advantages and propositions.

2. **The Hague's history of positioning as a Peace & Justice city.** The city's role as a host of institutions that embody peace, justice and law is coloured by the current geopolitical climate. With more polarisation and skepticism of international institutions and the rule of law, this creates a new challenge to the idea of being an 'international' city.

The Hague has to align with the values embodied by the institutions it hosts.

More need to articulate what the benefits of peace and justice are more broadly.

3. **The Hague's name.** The Hague is unique among cities in having a "The" in its name, and also other quite different names (e.g. 's-Gravenhage)

More people have heard of 'The Hague' than know instinctively that it is a city.

The Hague has to communicate its strengths and identity as a city.

The changing post-pandemic effects on The Hague's performance

The Hague's positioning also has to be understood in relation to the changing behaviours and competitive environment accelerated by the pandemic:

1. **More competition for attention for smaller cities.** There is some 'collective memory loss' among global audiences about which cities are good for what, and a need to redefine what makes cities distinctive beyond their most obvious assets.

2. **Attention on science and innovation is shifting to ecosystem and outcomes.** Access to capital, track record of commercialising research, ability to get new products adopted by the wider market, and the maturity of the innovation community, are more important after the pandemic.

3. **Competition for talent is hotting up.** Beyond just talent attraction, cities are having to work harder on lifelong talent development, and keeping the talent that already lives in the city. The precise character of a city's lifestyle, the texture of urban experience, and its regional dimension, are all becoming more important.

4. **More focus on habitat and sustainability.** More cities are being recognised for their progress to decarbonise, minimise energy-intensive travel and promote sustainable consumption choices. They are being judged more on their ability to become healthier, safer, more equal and more affordable. The Hague is not yet always compared in these domains.

Findings

Visibility

- **Given its size, The Hague benefits from a lot of appetite to measure, compare and understand it**. The Hague is the 900th largest city in the world yet is the 180th most visible. The Hague's distinctive role also means it has an outsized presence in the benchmarks that matter most. Impressively, it is featured in over a third of the most high-profile city indices – especially those that measure quality of life, expat appeal and talent attractiveness.
- However, The Hague is less visible for travel and culture. Surprisingly, it is also not widely covered for sustainability.

Stand-outs

- **The Hague stands out globally for its quality of life advantage**. The city is among the **top 20 globally** across all measures (14th in Europe).† It is recognised for work-life balance, connectivity, and environment. Strong perceptions of experience of expats and residents drive up its performance.
- **The Hague has achieved some clear successes in the new economy**. It is seen as making progress as a corporate base for firms who see the benefit being part of a closer-knit ecosystem and the proximity to influential government and non-governmental organisations. In a changing post-pandemic context the city is also regarded as a more resilient office market.
- **The Hague benefits from an engaged local 'fan club': people who know the Hague love it.** The average resident is more satisfied with life than in nearly any other European city*, and this has a positive effect on labour retention and productivity. The happiness and fulfilment of residents and workers can be an advantage for attracting and retaining more opportunity to The Hague.

Performance

- **Overall The Hague is the top 100 in Europe for performance** across all benchmarks. Among smaller cities, it is in the **global top 50** – standing out for stable corporate demand, impact-oriented innovation, and ease of getting around. †
- **An all-rounder, The Hague could receive more performance recognition if:**
  - It invests in innovation and sustainability niches where it can stand out and punch above its weight
  - It embraces and showcases how technology can strengthen quality of life
  - It continues to tackle issues associated with growth management – especially cost of living, congestion, and green space
- **The Hague is competitive with – and sometimes outperforms - the other Big 4 in the Randstad in key areas** such as concentration of high-value companies, education levels and population diversity.

*Based on real-time crowd-sourced data from citizens, as reported in Numbeo Quality of Life Index 2023.
† Based on an ELO algorithm that calculates aggregate scores across all benchmarks (see Slide 17). Among cities with <2.5m people in the metro area.

Findings

Striking facts about The Hague

1. The Hague does clean public transport better than any city in Europe. (UITP)
2. The Hague has among the top 10 most diverse populations in Europe, and just outside the top 30 globally. (INSEAD GTCI)
3. The Hague is the 2nd best connected mid-sized city in Europe. (fDi Intelligence)
4. The Hague is the best city in Europe, North America and Australia for bike infrastructure. (People for Bikes)
5. The Hague is rated the 4th highest share of startup founders with tech or engineering skills. (Startup Heatmap Europe)
6. The Hague is 9th in Europe for progress towards SDGs. (Sustainable Development Solutions Network)
7. The Hague is in the top 25 smaller cities in the world for innovation ecosystem size. (StartupBlink)

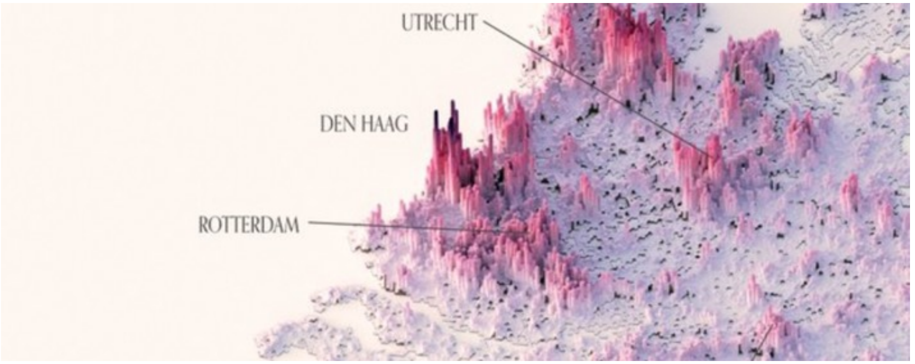
Surprises or omissions for The Hague

1. The Hague is rated stubbornly among the top 15% most congested in the world (INRIX Traffic Congestion Scorecard)
2. The Hague is penalised for lower green space coverage and access, where it is 79th / 155 cities (Husqvarna Urban Green Space Index)
3. Not yet featured in the main measure of cities' green finance, or resident quality of life (Z/Yen Global Green Finance Index; EU Barometer Quality of Life)
4. Bottom third for use of technology & smart apps to improve resident wellbeing (Gelmez et al. Evaluation of Smart Cities Index)
5. Rated outside global top 150 for number of high-level rotating meetings and conferences, down from 80th pre-pandemic. (ICCA)
6. Only 99th in Europe for visibility online – down with Aachen, Aalborg, Bonn (Resonance)
7. For Harmful NOx pollution, The Hague is in the bottom 5% in Europe (ISGlobal)

Findings

Gaps

- **The Hague is much more recognised in Europe than globally**. It appears more than twice as often in European studies than in global studies.
- **The Hague rarely gets the chance to gain credit from surveys of global experts and the general global public.** This especially applies to the quality of life and cultural offer – even though local performance is strong in these areas. This reduces coverage and distinctiveness among audiences outside of Europe.
- **The Hague is not yet on the radar of global professionals as a place to invest or do business in.** The Hague rarely features in the big global benchmarks that have the most influence in driving the global conversation. The Hague's smaller size, and its proximity to Amsterdam and other larger cities, are main reasons.



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- **The Hague's small size, higher density and urban boundaries means it gets rated higher for concentration but lower on scale measures.** This means that it rarely get credit as one of the most innovative or sustainable compact cities. The result is:
  - The Hague gets dragged down for issues like green space, car dependence, pollution as these are quite spatially intensive. This prevents it gaining top scores in international studies that look at lots of larger lower density cities.
  - More residents live in denser environment where perceptions of sustainability lag real performance (e.g. on recycling)
  - The Hague does not triumph in any well-recognised and well-covered sustainability niche (e.g. Oslo EVs, Amsterdam circular economy, Vancouver hydrogen & fuel cells)
  - Innovation continues to be judged mainly by inputs (patents, publications) or scale (e.g. size of start-up community) rather than relative contributions and outcomes.
  - As 'impact' becomes more understood and promoted, The Hague may be able to better establish itself as a leader in the global innovation marketplace.

Implications

The Future

On balance the Hague's scores are likely to improve as more cities get judged on quality, experience and concentration. Yet in order to become regularly featured in its own right as a world-class 'liveable' city it will have to address growth management challenges which relate to the wider region.

The Hague can communicate the best of both worlds. It benefits from all the scale, connectivity and business advantages of its links to the rest of Holland (e.g. access to talent pool, shared labour market, industry edges). Yet it retains advantages of compactness and efficiency, and fewer of the diseconomies of scale compared to larger cities.

Optimising the Region

The Hague will continue to be seen as a specialised part of a region with Rotterdam, Amsterdam and Utrecht. It makes important contributions to the wider ecosystem – specialist capability, flexibility, housing and lifestyle choice, and access to talent. In some contexts – especially where scale and combinations of assets are important - it will make sense to promote itself jointly with the larger cities.

What Next

The Hague can:

1. Promote the areas where it is a genuine leader – in the world or in Europe: clean public transport, satisfaction with life and work, and corporate resilience.

2. Build more of its unique personality and highlight what makes the talent and quality of life offer distinctive. Expose the unknown and unappreciated assets, traits, capabilities to a wider global audience, especially outside Europe who need reminding.

3. Be intentional about scale - where it makes sense to focus on the City, and where to promote complementarity with the wider region. The Hague benefits where the Randstad competes on scale and variety, while the City can stand out on quality and concentration.

4. Target improvement and inclusion. The Hague can seek to improve in the benchmarks that matter by influencing some outcomes where the city underperforms, and prioritise 5-6 high profile benchmarks for inclusion.

5. Pursue more focused benchmarking. Agree who your like-minded and peer cities are worldwide, build up the identity of this group, and form a peer group and benchmarking club to track progress, set targets, monitor progress & share voice.

2. The Hague in Global Context

Why benchmark The Hague?

The Hague is in an important new phase of competition and positioning, where the main challenge is differentiation, world-class specialisation, and building familiarity outside of Europe especially.

This means The Hague can work to:

- Continue to **promote** what the city has traditionally been good at
- **Correct** any ensuring doubts or misperceptions
- **Show** the world where it stands out among the cities it is most like (in Europe, and among smaller regions)
- **Demonstrate** what it is really that makes the city distinctive, to drive visibility and feed back to performance
- **Make choices** about how it wants to grow, stand out, and work with its neighbours.

The Opportunity

- ✓ A key source of international insight and **perceptions**.
- ✓ More **visibility** and better all-round performance in benchmarks
- ✓ To stand out via recognition in specific **niches**
- ✓ To **monitor** progress and see if gaps are closing
- ✓ To **improve** faster than other cities
- ✓ To **confront** difficult choices

About this work

What it is

- A review of The Hague's key strengths in global city benchmarks, and areas where it surprisingly underperforms
- A global perspective on all potential competitors and comparators
- A whole-city perspective on how The Hague is doing

What it is designed to do

- ✓ Inform decision making in The Hague about distinctive niches it can develop
- ✓ Use benchmarks as a way to see how the world sees The Hague and guide positioning and monitoring efforts
- ✓ Suggest ways for The Hague to improve visibility and performance
- ✓ Provide advice on how The Hague can tactically use benchmarks given its constraints & ambitions
- ✓ Guide budgetary decisions for marketing & promotion
- ✓ Align with The Hague's Strategic Ambitions

What it is not:

- ✗ Not a comprehensive competitiveness analysis of The Hague, and its strengths and weaknesses
- ✗ Not an assessment of governance, strategies, fiscal or policy models of The Hague
- ✗ Not a recommendation of new policies that The Hague should adopt
- ✗ Not an evaluation of The Hague's brand campaigns to date

The World of City-Regions in 2023

There is an opportunity for The Hague to emerge in the next wave of specialised & in-demand regions.

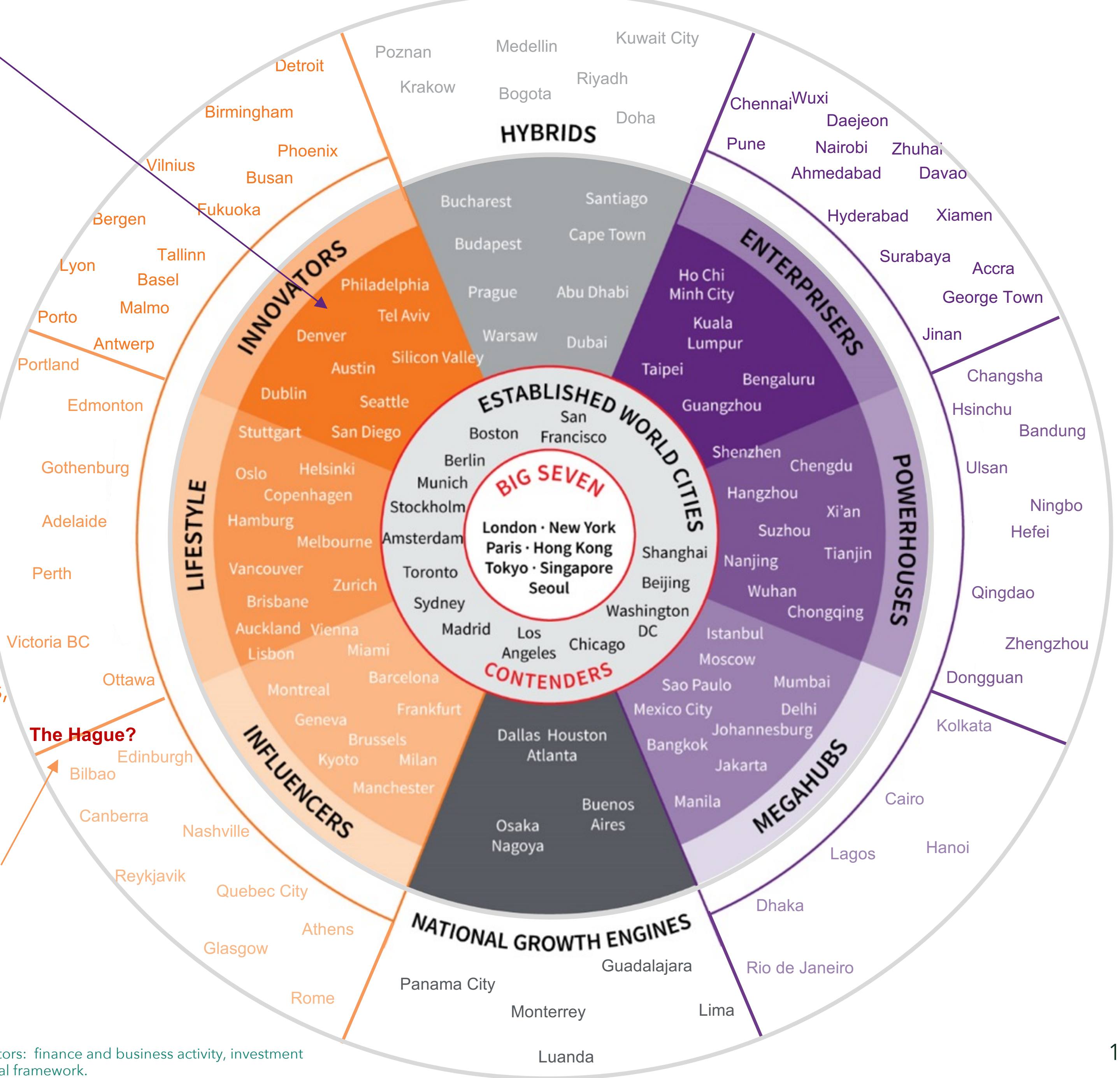
How does The Hague want to stand out?

- Quality of life advantages
- World-class specialisms in 2-3 innovation sectors?
- A business-friendly destination
- An influential first-mover on sustainability

Or a combination?

The inner rings reflect the cities most recognised for global investment and demand in the 2008-2020 period. The positions of each city reflect overall competitiveness*, and in which areas they emerge in the global top 20 for overall (e.g. quality of life, innovation).

Based on an overall review of the benchmarks, The Hague has the potential to be part of the next wave of 100+ cities – the 'outer ring'. Many of these cities are smaller and specialised, while remaining interdependent with larger cities and regions.



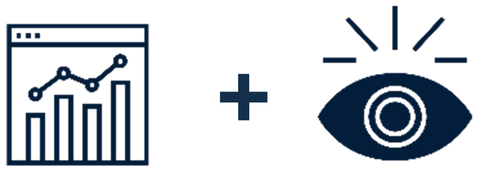
Source: adapted and updated from The Business of Cities & JLL

*Based on global analysis of 500 benchmarks that assess the relative performance of cities across the full range of indicators: finance and business activity, investment profile, demographic diversity, innovation, infrastructure, global reach, quality of life, culture, governance and institutional framework.

The growing number of city benchmarks

1,000+

city benchmarks, rankings, indexes, studies, surveys, etc.



Objective performance indicators and audience perceptions

A wider perspective

("Benchmarks" come from researchers, governments, consultancies, real estate firms, think tanks, media outlets, travel organisations and real-time platforms, among others)

How much a region features in these studies is a good indication of how important and influential it is in different areas.

Which benchmarks a region appears in, and how it scores in those benchmarks, can help to understand:

- How visible it is on the world's stage
- Areas of strength and opportunity
- Where more focus may be needed
- Who are new competitors to be aware of
- Where to look for inspiration

And many more…

What are benchmarks and why do they matter?

What benchmarks are

- "Benchmarking" means comparing The Hague to other cities using all of the publicly available studies that rank and compare cities
- Benchmarks include objective performance indicators (e.g. GDP per person) and subjective perception studies that survey people about what they think of cities
- They highlight the city's drivers and challenges in a different light which may help to guide The Hague's response
- They exert influence by informing perceptions and decisions of businesses, investors, talent and visitors
- They tend to reflect the performance of whole cities (as opposed to how the government itself is performing)

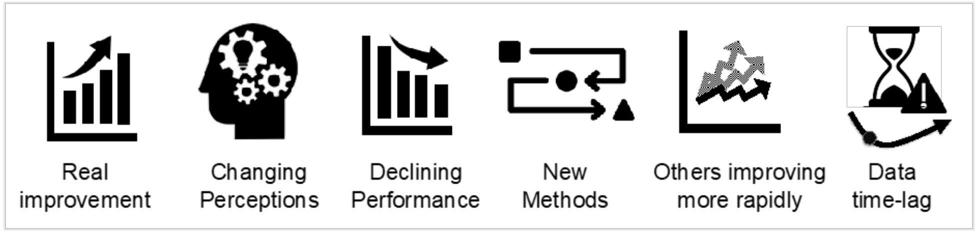
Caveats with Benchmarks

- It's all relative - a city can improve and yet fall behind others internationally if they improve faster.
- Data availability is improving but not all the issues or themes that matter to The Hague are yet covered by international data.
- Real improvements can take more than 1 year to register in the benchmarks. There is often a time lag between when data is collected and when it is published
- Performance in many areas is strongly shaped by factors outside immediate control of the City, including market demand and national factors. Benchmarking does not assign blame or responsibility.

What this all means is that:

- Each benchmark has its own logic, value and limitations.
- Benchmarks are not the 'truth' – they are the best possible way of measuring the situation.
- It is more insightful to read all of the benchmarks together, rather than focus on just one or two results.

Reasons why a city's score might change over time



Interpreting benchmarks: taking care for The Hague

Benchmarks do not simply see the world as it 'is'.
The Hague is analysed in a certain way that affects how it performs and its prospects to improve.

Breadth versus Depth

Because of their small size and narrower breadth and scale, small cities tend to be:

- rated **weaker** in all-round benchmarks
- rated **stronger** in specific themes or specialisms

Comparing apples with apples

Some benchmarks look at **500+** cities whereas others only look at 20. The Hague can often be competing against much larger cities, which makes it more likely that The Hague is penalised for its smaller scale.

For small cities like The Hague whose visibility is more patchy, it is more useful to:

1. Look at specific results rather than averages across all benchmarks.
2. Compare how The Hague rates against other cities rather than looking at average scores. The Business of Cities uses an ELO algorithm* to do this in the fairest way possible.

*The ELO approach rates cities by comparing their scores in every possible permutation against a list of other cities. This produces the most accurate comparative assessment of a city's scores, as it accounts for the fact that some cities appear in more rankings than do others, and also that each ranking measures a different number of cities. The ELO rating system originated in chess and is now widely used in competitive and policy contexts.

Scale matters

Most benchmarks that look at The Hague see it as a stand-alone City.

In practice, The Hague benefits from the scale, connectivity and business advantages of the wider Randstad (see Slides 18-19).

Compared to most cities The Hague is smaller, higher in density, and more 'under-bounded' (i.e. its urban extent goes beyond its formal boundaries). This means the Hague is more likely than other cities to be penalised for being small, and in some quality of life studies it is less likely to get top scores compared to larger, lower density cities.

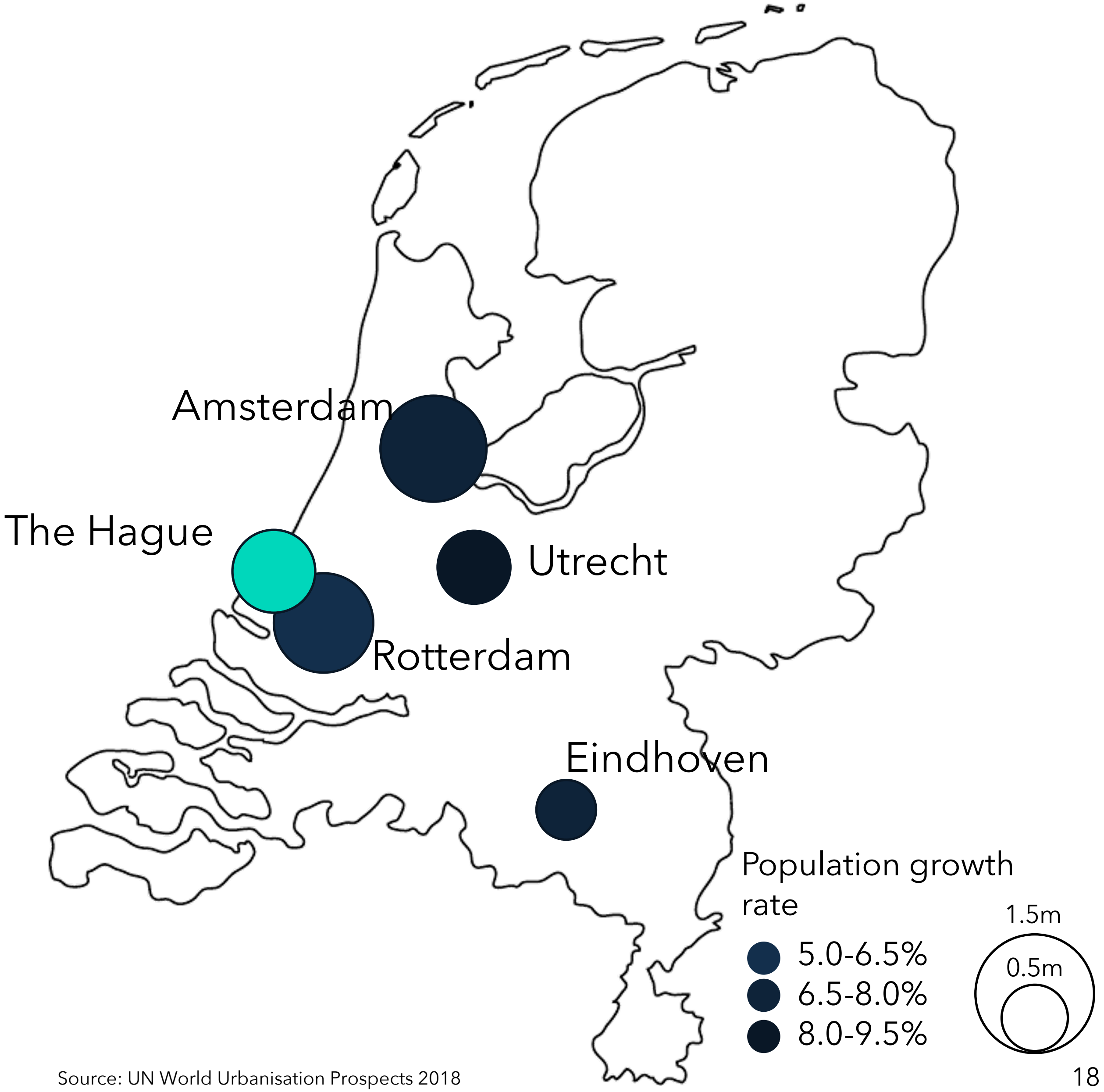
So The Hague needs to be very intentional about scale.
It can:

1. Look to stand out against other small cities by promoting measures of quality and concentration.
2. Promote its role in the wider region (e.g. where the wider region competes successfully for scale and variety)

See Section 6 for more.

Scale matters: The Hague has an unusual regional dimension

- 1 global hub: Amsterdam
- Amsterdam, Rotterdam, Utrecht and Eindhoven complement The Hague with different assets and specialisms
- An integrated system of cities, very well connected through:
    1. high quality digital and rail connectivity,
    2. complementarity of specialisms and,
    3. talent mobility
- Ongoing cycle of investment to enhance integration
- High level of local spending and decision-making is a driver of change. (as one of the 10 most decentralised countries in Europe - 30%+ of all public government spending is made subnationally)



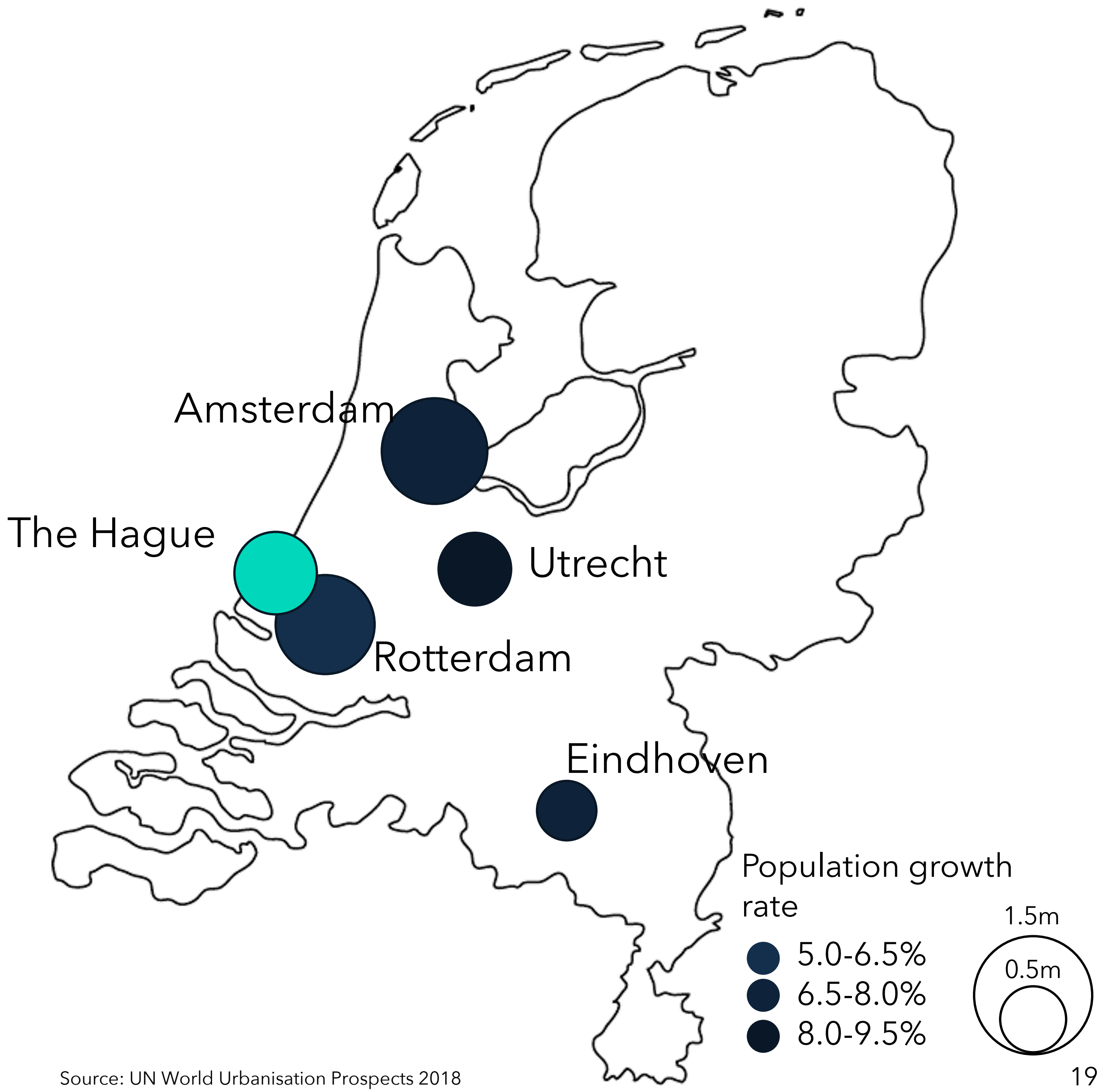
Source: UN World Urbanisation Prospects 2018

Scale matters: The Hague has an unusual regional dimension

- The Hague's economic geography operates at multiple scales. This means there are different advantages and propositions to communicate at each one.

- From the perspective of many businesses, The Hague is part of a single catchment area, a single opportunity for commercial and corporate real estate, and a single integrated labour and talent market.

- This allows The Hague to punch above its individual weight. Yet it can also obscure The Hague's unique assets and attributes.



Source: UN World Urbanisation Prospects 2018

Perceptions

What people think about The Hague

Subjective perception studies and surveys*

Performance

How The Hague is really doing

Objective indicators

- Perceptions of The Hague are **not** the same as Performance.
- Usually for The Hague, the city performs better than people think it is doing. This is because the city is not a first choice reference point internationally – the people who are not as familiar with the city have a less clear picture of what it stands for or is good at.
- Example: Cultural offer – If asked, The Hague is not rated by the global public yet as a top destination to enjoy and experience culture
- Example: Sustainability – Despite progress on the SDGs, the city is not yet recognised globally as an obvious leader.

So low scores do not always mean that The Hague is not performing well – or even that local people are not happy. Instead it can reflect a lack of awareness or a lack of choices to include The Hague.

In some cases The Hague will need to prioritise improving 'performance'. In others the major challenge is perception.

*Global public, visitors, students, expats, global experts, etc.

The Hague's peers

The Hague's range of functions and attributes means that it has multiple 'peer groups'.
Some cities share multiple points of similarity with The Hague.
The Hague will benefit from greater power by association with groups of cities such as these.

Influential cities associated with "peace " and "justice"	Smaller liveable hubs in the wider orbit of larger cities	Cities with key political and administrative roles	Cyber and defence hubs	Cities using innovation to exercise soft power and solve global challenges	Cities with similar all-round economic competitiveness	Cities sharing multiple features with The Hague (size; performance; assets)
Oslo	Kyoto	Canberra	San Diego	Montreal	Leipzig	Geneva
Auckland	Victoria (BC)	Geneva	Tallinn	Gothenburg	Bern	Kyoto
Bogotá	Bern	Wellington	Belfast	Copenhagen	Seville	Canberra
Geneva	Malmö	Edinburgh	Richmond (VA)	Oslo	Kobe	Ottawa
Louisville	Ottawa	Strasbourg	Vilnius	Vienna	Dusseldorf	Bern
Vienna	Dusseldorf	Ottawa	Montreal	Raleigh (NC)	Bergen	Oslo
Kyoto	Tallinn	Cardiff	Canberra	Tallinn	Yokohama	Vienna

3. The Hague's visibility, performance and perception

The Hague's visibility in global benchmarks

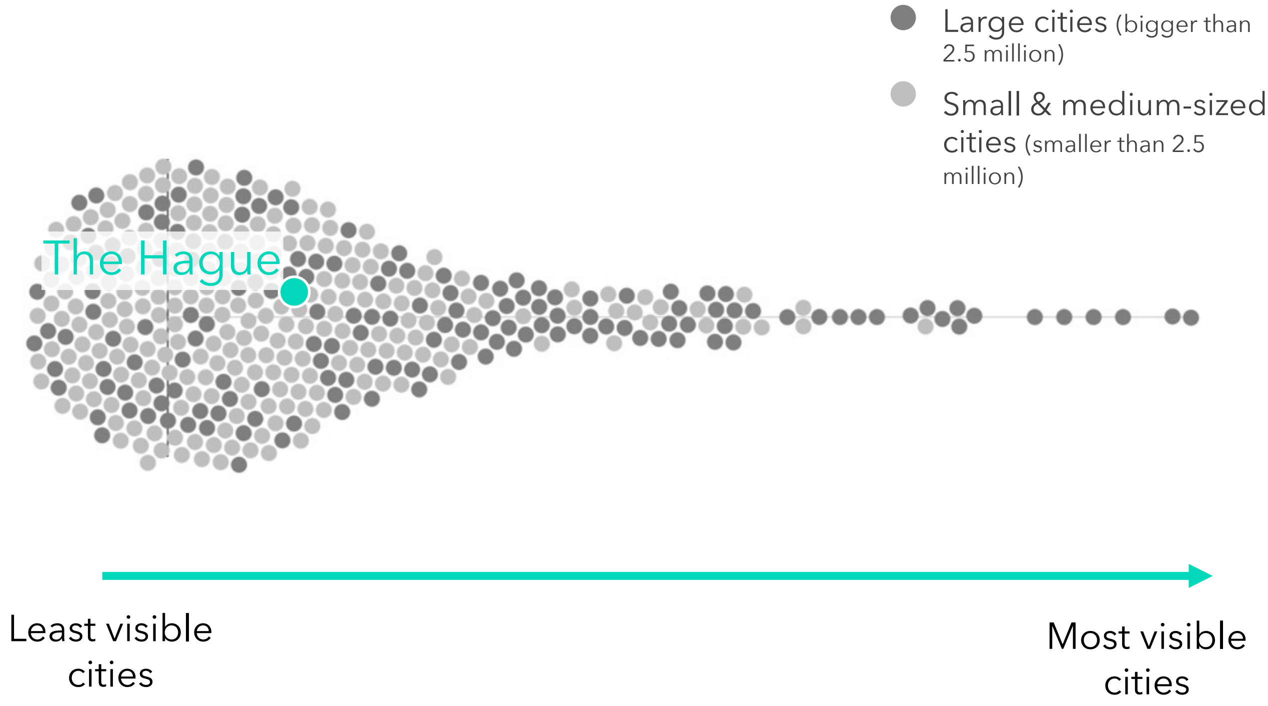
Visibility in benchmarks shows how important a city is in the world's consciousness. It:
- Reflects how much The Hague features in people's global 'mental map'
- Gauges whether people see The Hague as being important enough to warrant inclusion among a larger group

Among European cities, The Hague is:
- 31st most visible in benchmarks that look only at Europe.
- 73rd most visible in benchmarks that look at the whole world.

The Hague appears in more than 25% of benchmarks that only assess European cities, but only 10% of global ones.

The city is an obvious choice for benchmark producers evaluating cities in Europe. This partly reflects its status as an administrative capital, its role in the Dutch system of cities and its lead on many European agendas – such as the SDGs.

The gap at the global level raises the question how The Hague gets on to global mental map. As investors and businesses look away from more established and 'in-demand' cities, can The Hague now attract more attention?



What shapes the Hague's visibility

What drives The Hague's visibility up	
Administrative capital	The Hague is included in more benchmarks that look at e.g. smartness, talent, quality of life, hosting of conventions.
International influence	Presence of international institutions and expats make it more likely to feature in medium-to-high influence studies of talent perception, appeal and costs.
Quality of Life	Established quality of life advantage drives appearance in high profile data aggregators like Numbeo which many other index providers draw on, creating snowball effect.
Proximity to Rotterdam	Often measured jointly with Rotterdam as part of the same metropolitan area.

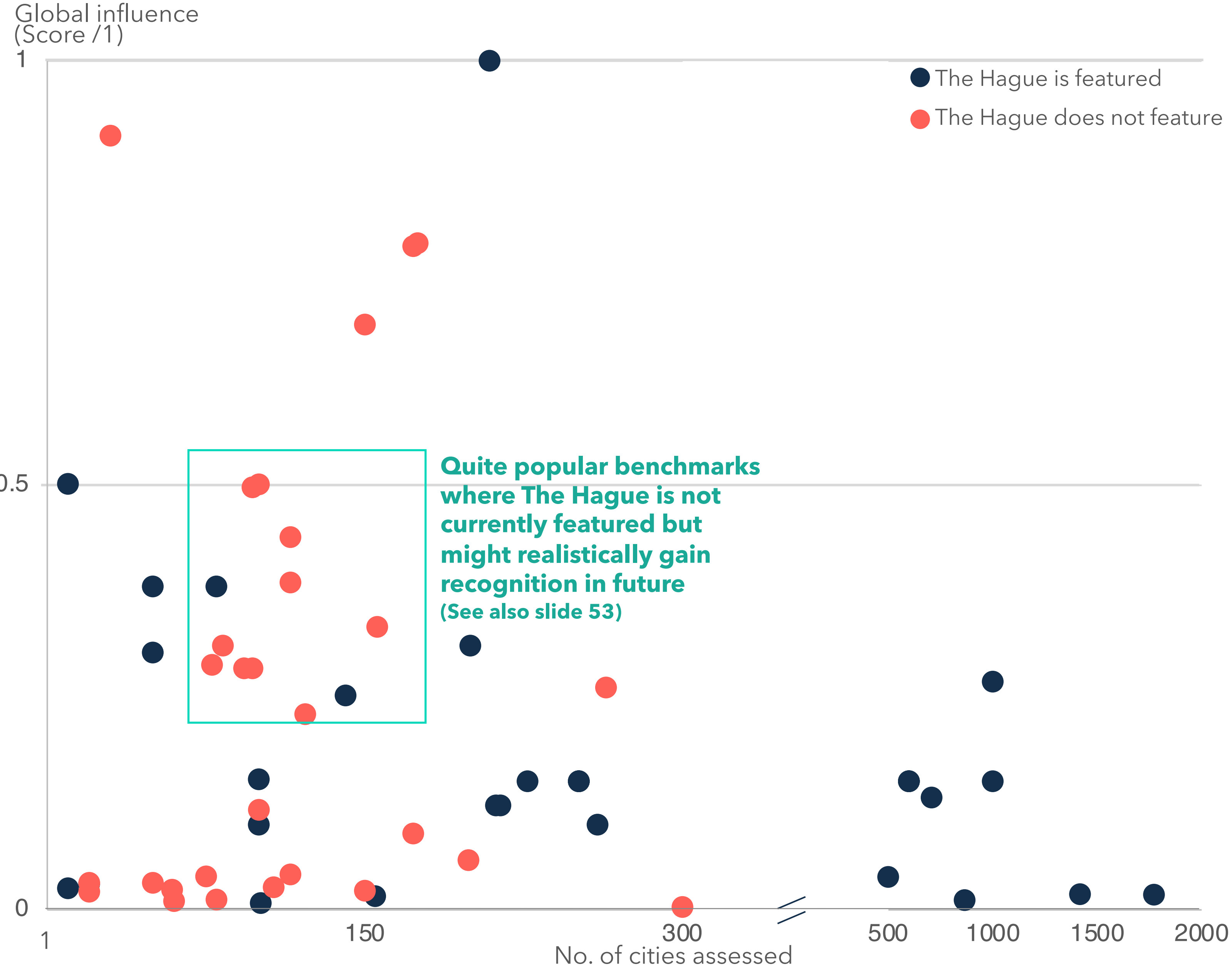
What drives The Hague's visibility down	
Smaller size	As a 560,000 City in a fairly small and sometimes weakly understood metro region (2.5m), The Hague is omitted from benchmarks that look at the 100 biggest cities
Wider system of cities	As the 3^{rd} city in Netherlands, The Hague is often omitted from benchmarks that strive for global coverage by picking only the 1-2 largest cities by country
Language	Benchmarks producers might also not always find The Hague's data if it's under a different name (Den Haag, 's-Gravenhage) or not easily accessible in English.

Key sectors

Peace & Justice | Security | Legal & Policy | Impact

	Population	Global rank (/1,800 cities)
City size	560,000	868^{th}
Metro size (The Hague-Rotterdam)	2.5m	249^{th}

The Hague's visibility in high-profile global benchmarks*



Most benchmarks have limited influence. A smaller number are highly influential and shape global conversation and choices.

The Hague tends to appear mostly in studies that look at a lot of cities. There are still several important, very visible but selective benchmarks The Hague does not appear in, such as:

- IESE Cities in Motion
- EIU Global Liveability Index
- QS Best Student Cities
- Kearney Global Cities Index

Often The Hague is not eligible for studies that look only at the largest 1-2 cities in each country or have strict requirements to have fair global spread.

The Hague can focus on specialist benchmarks that are more realistic for the city to be able to feature in. These tend to be benchmarks with medium influence, such as:

- Global Green Finance Index
- Global Destination Sustainability Index
- EU Barometer Quality of Life in European Cities

For all full list of these benchmarks, see Slide 53.

*Sample of 60 benchmarks

The 20 highest-profile global city benchmarks

Out of the 170 benchmarks produced in the past 12 months:

The Hague is in 7 of the top 20 most influential*

The Hague stands out most in surveys of locals

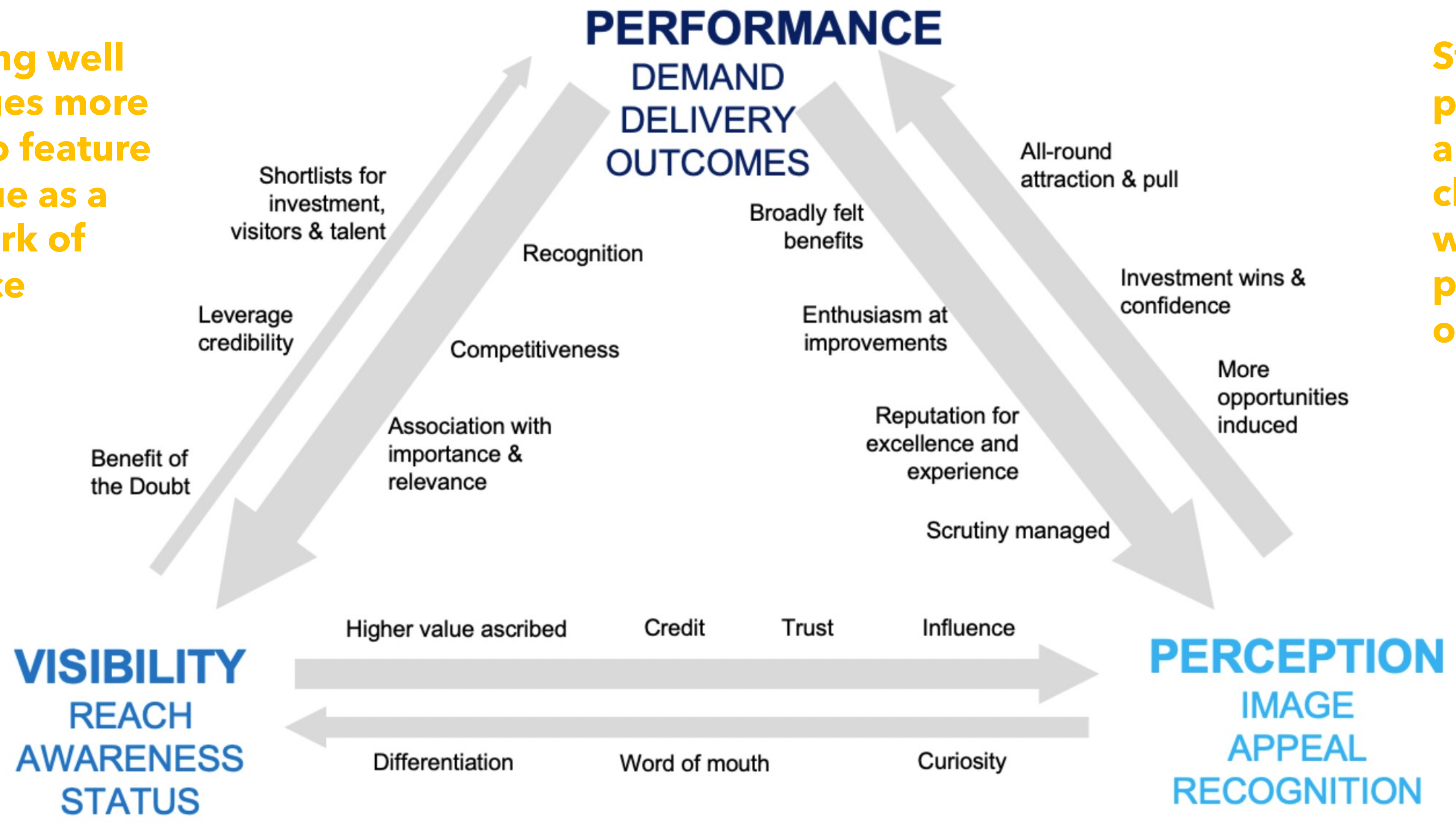
20 most influential benchmarks produced in past year

Benchmark	What does it measure	Does The Hague feature?	Rank	Does it look at how the city is performing, how it is perceived, or both?
Mercer Cost of Living Survey	Overall cost of living, based on PPP prices of a basket of more than 150 items (goods & services)	Yes	46th / 227 (1st = most expensive)	Performance
INSEAD Global City Talent Competitiveness Index	City's ability to attract and retain talent and grow its talent base, as based on 30+ performance measures	Yes	41st / 175	Performance
EIU Global Liveability Index	Overall quality of life for expats (20+ inputs)	No	-	Performance
Knight Frank Global Residential Cities Index	Year-on-year growth in house prices	No	-	Performance
fDi Global Cities of the Future (Top 10)	How attractive cities are for foreign direct investments, based on 100+ performance measures	No[1]	-	Performance
Demographia International Housing Affordability	How many years of income needed for a household to buy a house (price-to-income ratio)	No[2]	-	Performance
QS Best Student Cities	How attractive a city is for students, including university rankings, student numbers and mix.	No	-	Both
Z-Yen Global Financial Centres Index	How highly finance sector professionals rate the city's financial competitiveness	No	-	Perception
Startup Heatmap Europe	Popularity of city as a destination among start-up founders (survey based)	No[3]	-	Perception
Kearney Global Cities Index	Extent to which a city can attract, retain, and generate global flows of capital, people, and ideas.	No	-	Performance
ICCA Country and City Rankings	Number of international association meetings held in the city	Yes	164th / 464	Performance
Internations Expat Insider City Ranking	Expat satisfaction with life, work, ease of settling in, finding friends, etc.	Yes	20th / 49	Perception
Z-Yen Global Green Finance Index	How highly finance sector professionals rate the maturity of green finance in the city	No	-	Perception
Startup Genome Global Startup Ecosystem Report	All-round strength of the innovation ecosystem: funding, market reach, talent base, connectedness, etc.	No	-	Performance
Inrix Traffic Congestion Scorecard	Number of hours lost annually to congestion, impact on productivity	Yes	880th / 991	Performance
IMD Smart City Index	Impacts of smart technology on resident well-being	Yes	43rd / 141	Perception
Numbeo Quality of Life Index	How highly local residents perceive quality of life, based on citizen-inputted data.	Yes	1st / 196	Perception
Resonance World's Best Cities	All-round measure of city's destination appeal to residents, businesses and visitors.	No[4]	-	Performance
IESE Cities in Motion Index	Composite of 100+ performance measures across economic, social, environment, connectivity, infrastructure	No	-	Performance
Schroders Global Cities Index (Top 30)	City's investment potential based on 10+ economic, infrastructure, environment and innovation indicators	No[5]	-	Performance

*Based on total global online coverage (Google searches, news results, etc.)
[1] assessed but not featured in top 10
[2] only looks at English-speaking markets at present
[3] assessed but not featured in top 50
[4] features in Europe version only
[5] assessed but not featured in top 30

Visibility, performance and perception are inter-linked

Performing well encourages more studies to feature The Hague as a benchmark of excellence



Strong perceptions among users/ clusters/residents will have a positive impact on performance

A lack of visibility will reduce propensity to perceive The Hague positively

The Hague's performance

Looking across all of the benchmarks, The Hague rates as:

- 83rd in Europe
- Global Top 50 among smaller sized cities and regions

The Hague most resembles Leipzig, Fukuoka, Bern and Düsseldorf for all-round performance & economy

The Hague is globally competitive in some of the City's priority strategy areas – e.g. Global Top 20 on aggregate for Quality of Life (see Section 4)

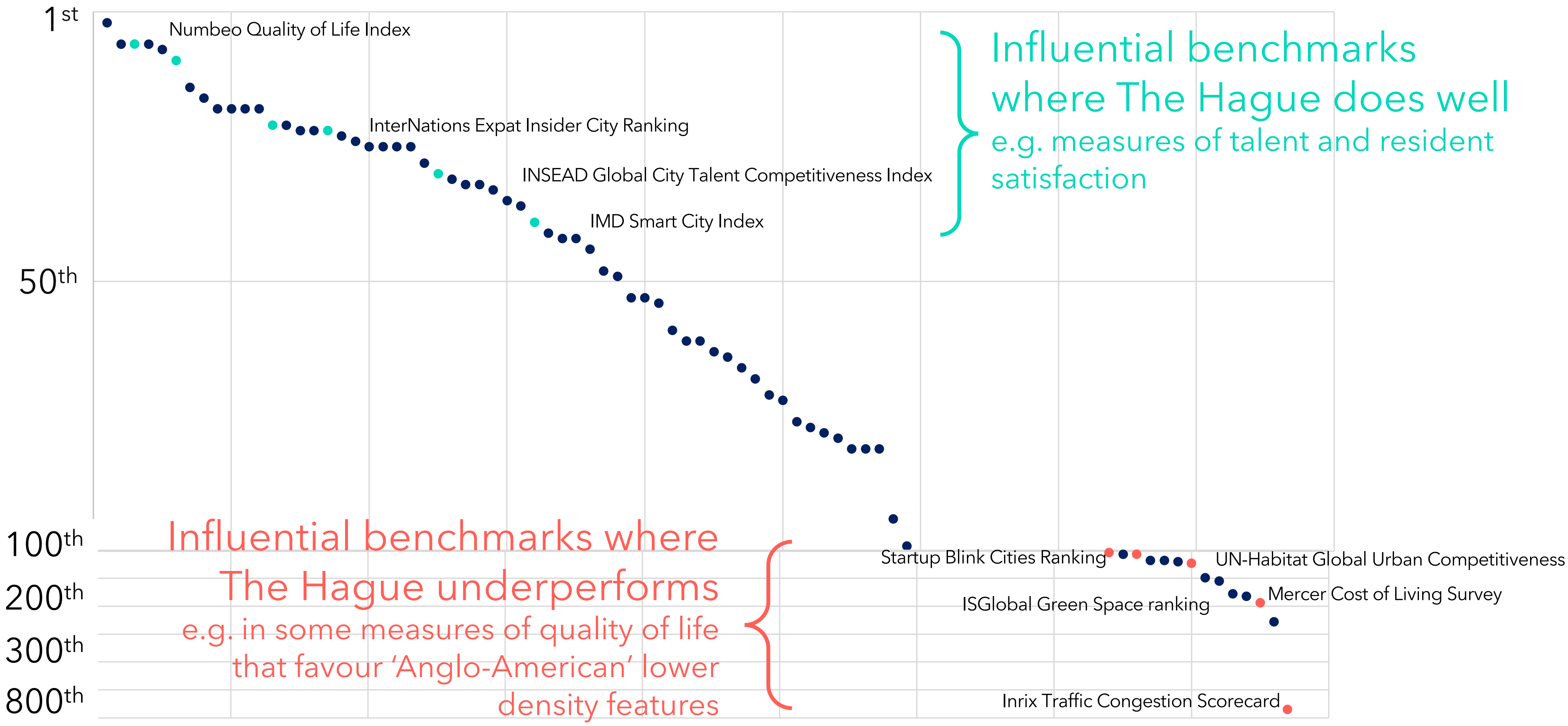
To improve its performance, The Hague can:

- Target high-profile benchmarks the city currently does not feature in, but would likely perform well if it did (see Slide 53)
- Seek to improve in the benchmarks that matter
- Promote The Hague's top scores and global contributions (see also Slide 49)

	2023
Position in Europe across all benchmarks*	83rd
Performance 'peers'	Leipzig, Bern, Dusseldorf

*Based on an ELO algorithm that calculates aggregate scores across all benchmarks (see Slide 17). Smaller = <2.5m within the region.

The Hague's performance: the good and the not so good



Note: The above chart shows The Hague's scores in individual studies or benchmarks. Where benchmarks include multiple sub themes or component parts, these are not shown.

The Hague's performance: The good

The Hague stands out for work-life balance, life satisfaction, clean mobility, and resilient corporate demand and investor appeal. It also punches above its weight for concentration of high-value firms and applied R&D.

Benchmark	Source name	Rank (number of cities assessed)
How satisfied local people are with quality of life	Quality of Life (Numbeo)	1st (195)
Uptake of clean buses in public bus fleet	UITP	1st (69)
Quality of bike infrastructure	People for Bikes	1st (1,733)
How connected the city is by air, rail and road	fDi Intelligence (Mid-Sized European Cities of the Future)	2nd
Medium-term office market resilience and outlook	AEW Regional Office Market Resilience Ranking	3rd (32)
Share of start-up founders with an engineering or technology degree	Startup Heatmap Europe	4th (10)
How happy expats are with online services access and availability	Expat Essentials (InterNations)	5th (50)
Office vacancies	Vacancy Rate (Cushman & Wakefield Tech Cities)	6th (78)
How happy expats are with work culture, job opportunities and job security	Working Abroad (InterNations)	7th (49)
Progress towards the SDGs	European cities SDG Index	9th (45)
Work environment, quality of life and access to services	Best Work/life balance (Holidu)	9th (124)
Concentration of top-tier global companies (Forbes 2000)	Presence of Forbes Global 2000 Companies (INSEAD)	13th (175)
Track record of innovation commercialisation compared to city size	Patent Applications (INSEAD)	15th (175)
How start-up friendly the business environment is	StartupBlink	18th (1,000)

Note: The above table includes sub themes or component parts of benchmarks as well as overall benchmark scores.

The Hague's performance: The not so good

The Hague falls behind in some measures of quality of life, including access to green space, cost of living and congestion. The city's does less well in terms of recognition of the cultural and leisure offer, online visibility, and structural conditions for long-term growth.

Benchmark	Source name	Rank (number of cities assessed)
How happy expats are with the local leisure options on offer	Quality of Urban Living (Internations)	36th (50)
Digital connectivity and download speeds	Bandwidth (HSE Global Innovation Cities Index)	68th (193)
How highly visitors rate the cultural, food and entertainment scene	Programming (Resonance)	70th (100)
Readiness to embrace and react to economic and business change	Dynamism (Swiss Life Asset Manager European Thematic Cities Index)	75th (135)
Green space coverage, access and health	Husqvarna Urban Green Space Index (HUGSI)	79th (155)
No. of high level rotating meetings and conferences	ICCA	164th (500+)
How visible the city is in the online conversation	Promotion (Resonance)	99th (100)
Number of jobs created by foreign direct investment	Jobs created by FDI (INSEAD GTCI)	111th (175)
Employee and corporate taxes	Cost of doing business (HSE Global Innovation Cities Index)	134th (200)
Long run economic growth prospects	Sustainable Competitiveness (UN-Habitat Global Urban Competitiveness Index)	136th (200)
Expat cost of living	Cost Of Living (Mercer)	182nd (227)
Traffic delays and congestion	Traffic Congestion Scorecard (INRIX)	880th (991)

Note: The above table includes sub themes or component parts of benchmarks as well as overall benchmark scores.

What should The Hague do in the areas where it underperforms?

IMPLICATIONS

There are 3 core reasons why The Hague underperforms expectations in benchmarks. Each presents a choice for how The Hague addresses it:

1. **Size and scale matter.** In many cases, The Hague is disadvantaged because it is only seen as single city. This is true for measures of economic dynamism, talent and innovation attractiveness (e.g. StartupBlink Cities Ranking, UN Habitat Global Urban Competitiveness Index).

   → The Hague has to consider its role in the wider region, and also look to stand out against other small cities.

2. **Macro factors beyond The Hague's control.** The City is penalised by relatively high cost of living, higher national level business costs, and other factors shaped by demand or policy in Netherlands.

   → Effective co-ordination and collective advocacy with provincial and national governments where policy and development choices affect city competitiveness and reputation.

3. **Other cities performing better or improving faster.** The Hague does also have some genuine competitive challenges of how to manage grow efficiently, or perception challenges that stem from a narrow identity or lack of visibility.

   → Tactical changes to how the city is promoted, and destination development, policy or placemaking innovation.

Perceptions of the Hague

	How visible in benchmarks that look at perceptions of each audience type	The Hague's aggregate score in benchmarks based on perceptions of*…
Expats	80-100%	7th
Residents	20-50%	15th
Global public	<20%	=179th
Experts	<20%	=89th*

For people who are familiar with the city, and experience it on a daily basis, The Hague is seen and understood to be a great city to live in.

Overseas talent and local residents agree the The Hague is liveable, safe, and a place to access good healthcare.

The Hague is not yet visible in surveys of experts or the general global public.

This is partly due to its smaller size and having larger neighbours – most of these surveys tend to ask people to name the 'top' cities for a specific thing, or which cities they'd most consider for moving to, starting up in or investing in.

The Hague benefits from an engaged local 'fan club' – but this is not enough to build an image for people especially outside Europe who don't know it well.

Lower visibility among global public & experts suggests people outside of Europe do not yet have a strong sense of what it is that makes The Hague distinctive, beyond some associations with Peace & Justice

*Based on an ELO algorithm that calculates aggregate scores across all benchmarks (see Slide 17)

Perceptions of the Hague

How visible in ben…
that look at perce…
each audience…

Expats 80-100…

Residents 20-50…

Global public <20%

Experts <20%

Opportunities

- Utilise The Hague's fan club for amplified promotional material, testimonials and interactive content.
- Target outreach to experts and professionals to scope opportunities to plan visits to show them the city –e.g. real estate professionals, food critics, startup founders
- Promote the advantages that are supported by The Hague's compact size (e.g. human scale, close-knit ecosystem, etc.) within a dynamic larger region
- Make more visible the ideas The Hague brings to the world, the fast-growing businesses it is home to, and the human experiences of investors and innovators

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4. The Hague's strategic priorities

Quality of Life
Attractive Business Destination
Impact City

The Hague's strategic priorities

- The Hague's **Quality of Life** advantage stands out – it ranks in the top 20 in the world across all measures, or 6th among cities of its size. With targeted focus on addressing cost and congestion issues, The Hague could become a top global leader.

- **Economic attractiveness** has the potential to be an important advantage for The Hague. In the post-pandemic context the city is regarded as a more reliable and resilient location for business and decision-makers, with high proximity conducive to innovation. To stand out The Hague may need to articulate business efficiency advantages of being a compact hub in a growth region.

- '**Impact**' is a promising area for The Hague but as a competitive feature of cities is not yet fully known or dissected. There is an opportunity for The Hague to define and demonstrate what good looks like in the global marketplace of cities.

What do benchmarks really look at?

For full list of benchmarks in each of the 3 themes, and the data underpinning them, see Appendix.

	Quality of Life	Attractive business destination	Impact City
Most common scale of analysis	City, Metro, Country	City, Metro, Country	City, Metro, Country
Type of data	Surveys, Public datasets, Real-time platforms, Primary research	Surveys, Public datasets, Primary research	Surveys, Public datasets, Real time platforms, Primary research
Most commonly used data points	1. Crime rates 2. Housing affordability 3. Commute time & congestion	1. Tax rates (corporate and personal) 2. Time and procedures to start a business 3. Talent base: education attainment	1. Size of impactful innovation sectors (Greentech, govtech, agritech etc.) 2. Ambition for net zero 3. Progress to clean mobility (eBuses etc.)
Data gaps	1. Access to amenities all across the city 2. Mental health and loneliness 3. How much talent is retained in the city	1. Policies to attract investment by industry 2. Ease of landing pad for investors 3. Availability of loans and funding	1. Progress to SDGs 2. Real progress towards decarbonisation 3. Renewable energy mix

If these data gaps are addressed, for example through new data science and GIS tools or ambitious new benchmarks, The Hague's position is likely to change in the next 5-10 years.

What do benchmarks really look at?

Impact City

Most common scale of analysis

City | | NL

Metro

Type of data

Su… | …s | Publicly available datasets | Real time platforms | Bespoke research

Most commonly used data points

1. Cri…
2. Ho…
3. Co…

…of innovation sectors in
…bition for net zero
…gress to clean mobility (eBuses etc.)

Data that is not yet looked at in a high level of detail or beyond 1-2 studies

1. Ac…
2. Me…
3. Ho…

…gress to SDGs
…l progress towards decarbonisation
…ewable energy mix

Implications

!

This means The Hague can pay attention to:

1. Which benchmarks The Hague should logically target to improve in (see also Slide 52)
2. How The Hague might go about improving its scores – e.g.:
   - By working with provincial and national government
   - By addressing stubborn challenges within the city (e.g. congestion, unaffordability)
   - By enhancing visibility and awareness of The Hague to people outside the Netherlands

- What opportunities there are for The Hague to seek to gain more coverage – especially in areas it does well (e.g. progress towards SDGs and decarbonisation, ease of landing for investors, etc.)

The Hague in the City's strategic priority areas

Quality of Life

How does The Hague Score?

When The Hague is ranked, its median position is **24th.**

When comparing the Hague's scores against all other cities, across all benchmarks, The Hague overall is[†]:

- **6th** among smaller and mid-sized cities
- **14th** in Europe
- **20th** globally

Who are The Hague's comparators?

- Kyoto
- Ottawa
- Tallinn
- Edinburgh
- Lausanne

Top performing small and mid sized cities

- Copenhagen
- Oslo
- Helsinki
- Zurich
- Kyoto

Key Insights

- The Hague is very near the top of the global charts among cities of its size.
- The city's efficiency and human scale is very visible - the ease of being able to access jobs, services, and get around.
- The average resident in The Hague is more satisfied with life than in nearly any other European city*.

x Global audiences seem not to know what is distinctive about the city's quality of life offer.
x The symptoms of growth challenges like unaffordability and congestion are becoming more apparent.
x It will be hard to get established as a world-class 'liveable' city without contributing to wider challenges in the region.

*Based on real-time crowd-sourced data from citizens, as reported in Numbeo Quality of Life Index 2023.
[†] Based on an ELO algorithm that calculates aggregate scores across all benchmarks (see Slide 17). Smaller and mid-sized = <2.5m in metro area.

The Hague in the City's strategic priority areas

Quality of Life

Clear advantages

✓ **Safety**
- Top 5% globally for how safe local people feel (Numbeo Safety Index)
- Top 15% of cities for share of women who feel safe walking alone at night (Holidu Cities with the Best Work/life balance)

✓ **Work-life balance**
- 9th for how happy expats are with the local work culture (Expat Insider)
- 9th globally for work-life balance (Holidu Cities with the Best Work/life balance)
- Top 25% for how easy it is to work flexibly (Selecta Employee Wellbeing Index)

✓ **Ease and efficiency of 'getting on'**
- 3rd among 50 cities for how easy newcomers find it to 'land' seamlessly in the city (InterNations Expat Insider City Index)
- Top 30% of cities globally for government transparency and access to public e-services (Institute for Quality of Life Happy City Index)

Other cities are ahead for:

! **Congestion**
- Bottom 15% for travel delays due to congestion (Inrix Congestion Scorecard)
- Bottom half of cities globally for traffic in the metro area (Inrix Congestion Scorecard)

! **Cost of Living**
- Bottom 20% globally for cost of living (Mercer Cost of Living Survey)
- 3rd highest year-on-year increase in rent prices among 24 European cities (Housinganywhere International Rent Index)
- Among 25% most expensive for cost of rent (Numbeo Cost of Living Index)

! **Air quality**
- Bottom 5% in Europe for NO2 pollution (ISglobal Ranking of Cities)
- Only 55th out of 140 cities for share of people who agree that air quality is not a challenge (IMD Smart City Index)

! **Building global awareness of the cultural offer**
- 70th in Europe for how highly visitors rate the cultural, food and entertainment scene (Resonance Europe's Best Cities)

Opportunities

- Focus attention on what it is specifically that makes The Hague's quality of life offer distinctive in regional and global perspective – the ease, efficiency, and having the time and money to do what matters
- Closely monitor The Hague's performance on growth management (congestion, affordability, air quality) and understand what kinds of intervention at what scale will make the difference

The Hague in the City's strategic priority areas

An attractive business destination

How does The Hague Score?

When The Hague is ranked, its median position is **64th.**

When comparing the Hague's scores against all other cities, across all benchmarks, The Hague overall is†:

- **45th** among smaller and mid-sized cities
- **36th** in Europe
- **82nd** globally

Who are The Hague's comparators?

- Leipzig
- Bristol
- Geneva
- Kyoto
- Santiago

Top performing small and mid sized cities

- Amsterdam
- Edinburgh
- Helsinki
- Wellington
- Calgary

Key Insights

- The Hague's business appeal is clear from its unique concentration of HQ hub functions.
- The city's consistent occupier base is an important source of resilience and appeal to investors and innovators looking to service a reliable client base.

x Business attractiveness and investment climate tends to be shaped primarily through national data. Most attention here goes to the main economic hub in each country.

x The Hague's prospects of getting recognised are held back by ratings of the time and the costs associated with permits or accessing credit, as well as conditions for investors.

† Based on an ELO algorithm that calculates aggregate scores across all benchmarks (see Slide 17). Smaller and mid-sized = <2.5m in metro area.

The Hague in the City's strategic priority areas

An attractive business destination

Clear advantages

✓ Corporate hub

- 13th globally for concentration of Forbes Global 2000 companies (INSEAD Global Talent Competitiveness Index)
- Top 10% of measured European cities for cost efficiency of office workers (AEW – Regional Office Market Resilience in Tough Re-Balancing)
- Top 25% of all cities for productivity (Global Residence Economic Power Index)

✓ Growth in office supply

- 3rd in Europe for pipeline of new office development over next 4 years (out of 32) (AEW - Regional Office Market Resilience in Tough Re-Balancing)
- 9th lowest office vacancy rate in Europe (out of 32) (AEW - Regional Office Market Resilience in Tough Re-Balancing)
- 20th least expensive office market among 79 global markets (Cushman & Wakefield Tech Cities Index)

✓ Connectivity

- 2nd for physical and digital connectivity among mid-sized cities (fDi fDi Global Cities Of The Future: Mid-Sized Cities)
- Top 30% among European cities for maturity of transportation infrastructure (Swiss Life Asset Manager European Cities Index)

Other cities are ahead for:

! Finance and bureaucracy

- Not yet in the top half of cities for how easy it is for business to access funding and how many bureaucratic hurdles there are (Swiss Life Asset Manager European Cities Index)
- Bottom 40% of cities globally for employee and corporate taxes (HSE Global Innovation Index)
- More municipal procedures to go through than in other Dutch cities (World Bank EODB Index)
- 2nd last among 10 Dutch cities for time needed to obtain construction permits (World Bank EODB Index)

! Maximising meetings tourism

- Bottom 15% as a destination for meetings, incentives, conferences and exhibitions (MICE) (GainingEdge Destination Cities Index)
- Fallen from 80th to 164th for number of high-level rotating meetings and conferences from 2019 to 2022 (ICCA Cities and Countries Ranking)

! Corporate investment

- Bottom half among 200 cities for no. of FDI jobs created (INSEAD Global Talent Competitiveness Index)
- Outside top 80 cities for attraction of FDI projects relative to population size (INSEAD Global Talent Competitiveness Index)

Opportunities

- Identify any cases for national/provincial business environment reforms or improvements
- Ensure events economy is competitive, compelling and integrated.
- Build the human stories of workers, start-ups and investors who set up, work and succeed in The Hague
- Assess whether current investment platforms best reveal The Hague to prospective investors in the city's wider perspective and its full range assets and advantages.

The Hague in the City's strategic priority areas

Impact City

How does The Hague Score?

When The Hague is ranked, its median position is **17th.**

When comparing the Hague's scores against all other cities, across all benchmarks, The Hague overall is†:

- **24th** among smaller and mid-sized cities
- **25th** in Europe
- **54th** globally

Who are The Hague's comparators?

- Gothenburg
- San Diego
- Montreal
- Bogota
- Tallinn

Top performing small and mid sized cities

- Stockholm
- Oslo
- Copenhagen
- Helsinki
- Zurich

Key Insights

- 'Impact' is currently viewed through the prism of ecosystem impact – how successfully cities are growing those strategic industries that will help to solve global challenges.
- So far it is slightly influenced by policy impact – i.e. the race to decarbonise, adopt sustainable & inclusive policy, etc.
- The Hague is recognised for its cleantech and greentech sectors, and as a first mover on sustainable mobility – for example clean buses.
- It is likely to improve even more if:
  - The Hague becomes more recognised as a green finance leader
  - The city's momentum in Govtech and Cyber was more visible (leading public innovation measures do not yet cluster cities by Govtech maturity)
  - Leading measures of ecosystem impact assessed concentration rather than overall market size

† Based on an ELO algorithm that calculates aggregate scores across all benchmarks (see Slide 17). Smaller and mid-sized = <2.5m in metro area.

The Hague in the City's strategic priority areas

Impact City

Clear advantages

✓ **Momentum in sectors that help address global challenges**

- Top 60 in the world for Clean and Greentech, or 15th among smaller & mid-sized cities (Startupblink Cities Ranking)
- Top 80 for foodtech (or 20th among smaller & mid-sized cities) (StartupBlink Cities Ranking)
- Top 90 for healthtech & life sciences (or 30th among smaller & mid-sized cities) (StartupBlink Cities Ranking)

✓ **Progress towards the SDGs**

- 9th in Europe at last available count (European Cities SDG Index)
- A+ for city-level adoption of sustainable climate policy (CDP)

✓ **Sustainable mobility city**

- Rated 1st among cities in North America, Europe and Australia for its bike infrastructure (People for Bikes City Rating)
- 13th most bicycle friendly city in the world (Money.co.uk Most Bicycle Friendly Cities)
- Highest uptake of clean buses in the public bus fleet in Europe (UITP City Transit Data Report 2021)

Other cities are ahead for:

! **Visibility and recognition of the sustainability of specific industries**

- The Hague is not yet featured in major studies of sustainable tourism and destination management (Global Destination Movement) or of circular economy (Bloomberg Circular Cities Barometer)
- It also does not yet get enough expert assessments to feature in the main measure of Green Finance (Z/Yen Global Green Finance Index)

! **Resident perceptions of sustainability**

- More residents live in a denser environment where it is more common for perceptions of sustainability to lag real performance. This helps explain why more residents in The Hague consider recycling and green spaces to be a key priority area than in other cities (IMD Smart City Index)

Opportunities

- Celebrate The Hague's leadership for clean bus fleets and other 'firsts'
- Raise the profile of the city's green finance industry and virtuous ecosystem
- Organise data by SDG and make it available to index producers
- Directly approach producers of influential small-scale studies to explore possibility of inclusion (e.g. Bloomberg Circular Cities Barometer, KPMG Net Zero Readiness Index)

Summary of The Hague's competitors

City of Peace & Justice	Quality of Life	Business-friendly	Impact City
Geneva	Kyoto	Lausanne	Gothenburg
Oslo	Ottawa	Nuremberg	San Diego
The Hague	The Hague	The Hague	The Hague
Vienna	Tallinn	Liverpool	Montreal
Bogotà	Edinburgh	Yokohama	Bogotá
Kyoto	Lausanne	Montevideo	Tallinn

The Hague in priority areas: summary and implications

	Quality of Life	Attractive business destination	Impact City
Performance	• Ensure The Hague stays vigilant on congestion, affordability, air quality – and how it needs to work with partners and neighbours to solve these.	• Identify what reforms and perceptions need changing, including with provincial and national government. • Streamline administrative procedures where possible • Enhance the events economy and its wider link to urban experience.	• Work with business and key sectors so that sustainability principles are adopted • Build up the itinerary of impact-focused events and opportunities to be present globally • Expand the reach of ImpactCity Start-up toolkit .
Influence	• Target next rung of Quality of Life benchmarks – small and large – to enhance visibility.	• Target European or mid-sized/smaller cities benchmarks where The Hague is likely to stand out more decisively. • Improve the investor interface and align with the wider regional opportunity.	• Share data to increase visibility in sustainability benchmarks to showcase its strengths globally – e.g. by organising data by SDGs or participating as a pilot city for SDGs benchmarks • Directly approach 5 indexes to see whether The Hague can be included. • Create an "Impact" global standard or certification • Develop global reach and profile in this area.
Storytelling	• Promote work-life balance more creatively • Build up visibility of The Hague's contrasting, non-diplomatic, less serious credentials.	• Reveal, evidence and encapsulate the benefits of work and careers in The Hague	• Build the link between green finance and global impact. • Make more of The Hague's number 1 scores.

5. What next for The Hague: actions & opportunities

Summary: What should The Hague do?

1. **Promote the areas** where you are a genuine leader – in the world or in Europe. Stay focused on these and remember you can lead as a City or a region.

2. **Build more of the unique personality** and highlight what makes the talent and quality of life offer distinctive. Expose the unknown and unappreciated assets, traits, capabilities to a wider global audience, especially outside Europe who need reminding.

3. **Be intentional about scale** - where makes sense to focus on the City, and where to promote complementarity with the wider region. The Hague benefits where the Randstad competes on scale and variety, while the City can stand out on quality and concentration.

4. **Target improvement and inclusion.** The Hague can seek to improve in the benchmarks that matter by influencing some outcomes where the city underperforms, and prioritise 5-6 high profile benchmarks for inclusion.

5. **Pursue more focused benchmarking.** Agree who your like-minded and peer cities are worldwide, build up the identity of this group, and form a benchmarking club or peer group to track year-on-year progress, set targets, and monitor progress.

1. Promote where The Hague is already a leader

Quality of life leader

Attractive business destination

Impact City

Established quality of life advantages

- **Top 10** globally for how safe locals feel (Numbeo Safety Index)
- **Top 10** among 50 global hubs for how fulfilled expats are (InterNations Expat Insider City Ranking)

More top-tier companies than expected

- **Top 10%** of cities globally for concentration of high-value firms (INSEAD Global Talent Competitiveness Index: G2000 companies)
- **Top 20** among small to mid-sized cities for value of world top-2000 companies (Global Residence Economic Power Index – 68th out of 150 cities globally)
- **Top 20** in Europe for business density and labour market growth potential (SwissLife Asset Managers European Cities Index)
- **Top 25** among small to mid-sized cities for start-ups, scale-ups and VC attraction (HSE Innovation Cities Index)

High skilled talent supply

- **4th** in Europe for share of founders with tech/engineering skills (Startup Heatmap Europe)
- **Top 20%** globally for share of highly educated people (INSEAD Global Talent Competitiveness Index)

Robust office pipeline

- **Top 10% in Europe** for medium-term office resilience (AEW – Regional Office Market Resilience in Tough Re-Balancing)

Leading in important clean growth niches

- **1st** among European, Australian and North American cities for cycling infrastructure (People for Bikes Cities Rating)
- **Highest share of clean buses** among 92 European cities (UITP City Transit Data Report 2021)

Impact-driven innovation landscape

- **Global top 100 ecosystem** in 3 industries that will shape future of society (energy & environment, health, and food & agritech) (Startup Blink Cities Ranking). Among small to mid-sized cities, The Hague is:
  - 15th for energy and environment
  - 20th for foodtech innovation
  - Top 30 for healthtech and life sciences innovation
- **9th in Europe** for progress towards the SDGs (European Cities SDG Index)

The Hague will not solve its size disadvantage overnight. It will need to promote assets that are in the wider region.

Its wider universities, innovation capabilities and policy leadership.

2. Build more of The Hague's unique personality

Given the after-effects of the pandemic, there is more of a need for The Hague to expose its assets, traits and capabilities to people outside of Europe.

This may mean

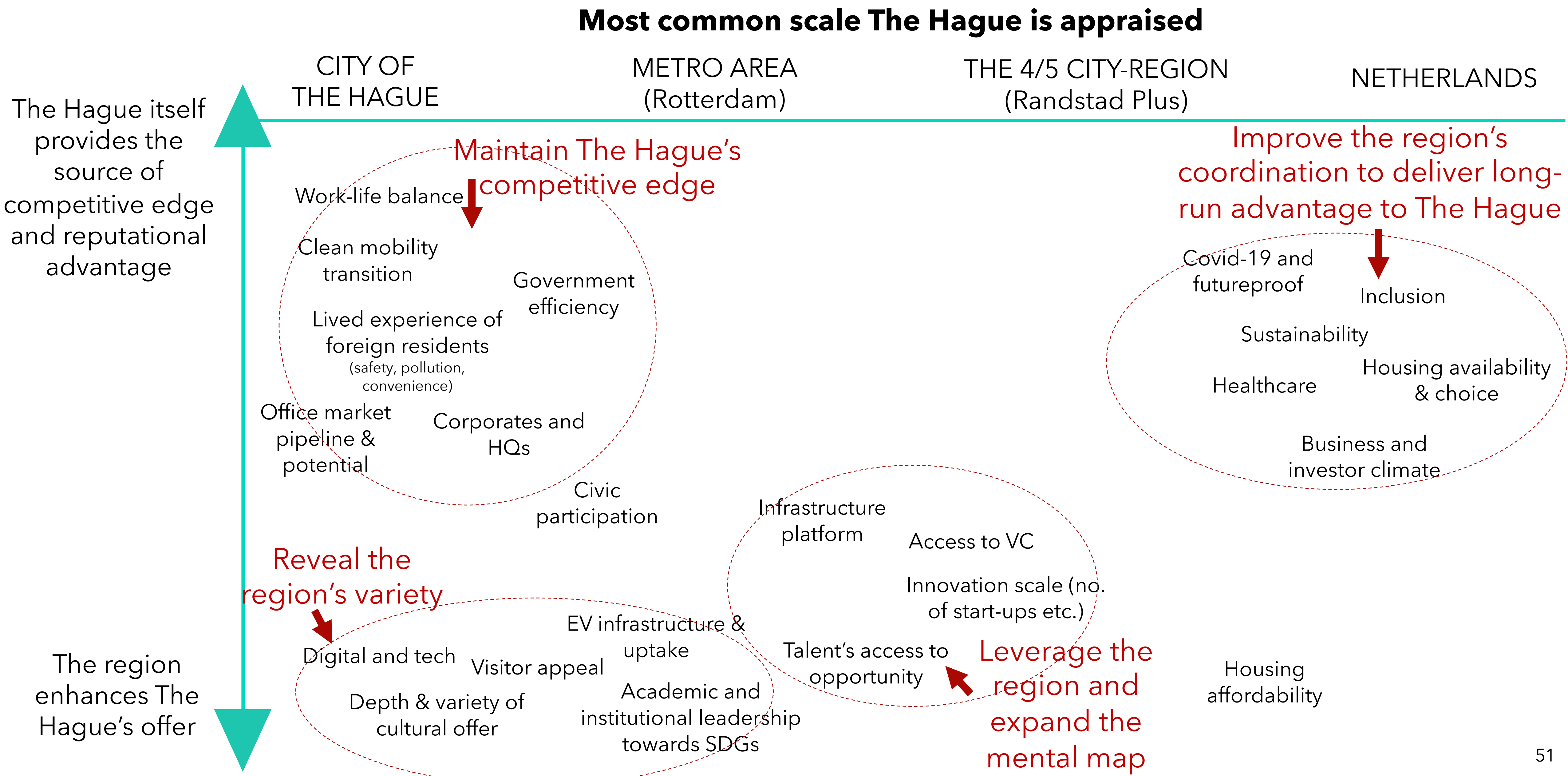
1. Growing civic participation and communication in the brand alliance to bring even more scale, diversity & quality to it – e.g. Universities, Hotels, Visitor organisations, Large corporates, Non-profits

2. More stories from the investors and innovators

3. Bring to life the world-changing, fast-growing and impact-driven businesses The Hague is home to.

4. Be bold in showing what life really is like, beyond the stereotypes.

3. Be intentional about scale



4. Target improvement and inclusion

4.1 Improvement

When using benchmarks to drive decisions about how to improve, The Hague can focus on benchmarks that:

- Are highly influential and drive the global conversation and visibility (e.g. because they tend to be used by other studies. This means even small improvements to performance can drive significant improvements to visibility and perception.)
- Are based in granular data that is responsive to real-world change
- The Hague does not currently perform well in - even compared to other cities of its size and calibre
- Measure areas City of The Hague can influence

The following benchmarks meet all of these criteria. It makes sense to focus on these in the first instance.

Benchmark	Source	Rank (number of cities assessed)	What could The Hague do?
No. of high level rotating meetings and conferences	ICCA Cities and Countries Ranking	164th (500+)	Continue to integrate approaches among local partners across facilities, hospitality, leisure and experience. Build up the itinerary of impact-focused events and opportunities to be present globally. Showcase the city's sustainable MICE tourism credentials to enhance appeal to the next generation of mobile allocators.
How visible the city is in the online conversation	Resonance Europes Best Cities 2023	99th (100)	Target outreach to countries outside of Europe. Leverage The Hague's fan club and diaspora networks to communicate the benefits of living and working in The Hague. Build the human stories of workers, start-ups and investors who set up, work and succeed in the city. Rally around one specific innovation or sustainability niche that the city can become associated with internationally beyond Peace and Justice.
No. of jobs created by foreign direct investment	INSEAD - Global City Talent Competitiveness Index	111th (175)	Assess whether current investment platforms best reveal The Hague's assets and advantages to prospective investors (e.g. commercial properties and development sites, and data on population, workers, consumer spending and businesses).
Employee and corporate taxes	Higher School Of Economics Global Innovation Index	134th (200)	Identify any cases for national/provincial business environment reforms or improvements (E.g. to tax rates & fiscal incentives)
Traffic delays and congestion	Inrix Traffic Congestion Scorecard	880th (991)	Organise international roundtable or series of visits to understand how other cities have managed congestion.

4. Target inclusion and improvement

4.2 Inclusion

There are several medium to high-profile, trusted benchmarks and indexes where The Hague does not currently feature. Being included in these indexes would drive improvements in The Hague's visibility, and also its performance, because the magnitude of coverage they get in the media and online means they shape the global conversation, as well as decisions of prospective residents, talent and mobile asset allocators.

For some studies, The Hague is likely to do well, and should aim to be included – either by considering paying for inclusion or by following up directly with the index producer to express interest.

For others, population size and scale is an important part of the selection criteria and the study only evaluates cities above a certain threshold. In these cases, The Hague should either advocate for a small cities version of the index, or suggest to be measured jointly with Rotterdam.

Consider paying for inclusion

- Monocle Quality of Life Survey
- Global Destination Sustainability Index

Propose a Small Cities version

- BCG Cities of Choice (the index already looks at four size categories of cities, down to "middleweight cities" – there may be scope for a smaller size category

Scope opportunities to be measured jointly

- QS Best Student Cities - need 2 world top 1,000 universities to feature. Possibility of inclusion as The Hague-Rotterdam? (Delft University of Technology + Erasmus University Rotterdam) or talk to QS to see if Leiden could be included given satellite campuses

Speak to them directly

- Arcadis Sustainable Cities Index
- Bloomberg Circular Cities – currently the index looks at C40 cities. May be worth understanding if cities not in C40 but with mature or ambitious circular economy strategies could also be featured
- Kearney Global Cities Index
- Nature Science Cities
- EU Barometer Quality of Life in European Cities
- IESE Cities in Motion – as long as The Hague is in the Euromonitor Cities Passport database, open in principle to including new cities

5. Pursue more focused benchmarking

- The Hague may find it useful to benchmark progress among a core group of peer cities that share multiple points of similarity and comparability
- The Hague could track performance in the 3 key strategic priorities, both:
  - Among this core peer group
  - In the wider world of smaller city regions
- This could help to:
  - Set targets
  - Monitor progress over time
  - Understand how The Hague is evolving relative to a fast-changing group

The Hague
Geneva
Kyoto
Canberra
Ottawa
Bern
Oslo
Vienna

Appendix

Top 10 Appearances for The Hague

	Global or European	Index	What does the index measure?	Rank (number of cities assessed)
Quality of life leader	Global	Numbeo Quality of Life Index	How satisfied local people are with quality of life across a series of measures	1st (195)
Quality of life leader	Global	People for Bikes	All-round quality of bike infrastructure	1st (1,733)
Quality of life leader	Global	Numbeo Healthcare Index	Local perceptions of healthcare quality, affordability and accessibility	3rd (195)
Quality of life leader	Global	Numbeo Traffic Commuting Index	Commuting time	4th (195)
Quality of life leader	Global	Digital Life (InterNations)	How happy expats are with online services access and availability	5th (49)
Quality of life leader	Global	Average monthly salary after tax (Preply)	Average after-tax monthly wages	5th (30)
Quality of life leader	Global	Numbeo Pollution Index	How highly local people rate the local environment (air quality, green space, etc.)	6th (195)
Quality of life leader	Global	Working Abroad (InterNations)	How happy expats are with work culture, job opportunities and job security	7th (49)
Quality of life leader	Global	Numbeo Safety Index	How safe local people feel in the city, and how quickly they view crime to be increasing	8th (195)
Quality of life leader	Global	Cities with the Best Work/life balance (Holidu)	Composite measure of work environment, quality of life and access to services	9th (124)
Quality of life leader	Global	Safety & Security (InterNations)	Expat perceptions of safety	9th (49)
Attractive business destination	European	fDi European Cities of the Future: Connectivity	All-round connectivity and accessibility (by air, rail and car)	2nd
Attractive business destination	European	AEW Regional Office Market Resilience Ranking	Medium-term office market resilience and outlook	3rd (32)
Impact City	European	UITP Clean Bus Report	Share of clean buses in public bus fleet	1st (69)
Impact City	European	European Cities SDG Index	Progress towards the SDGs	9th (45)