

Till Styrelsen för
Stockholm Business Region

Rapport om de fem Benchmarkingstäderna

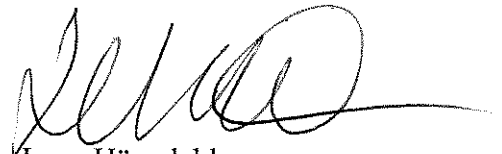
Förslag till beslut

Styrelsen för Stockholm Business Region föreslår

att följande rapport godkänns.



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Ärendet

Städer och regioner tävlar allt mer om att få ta del av det globalt växande investeringarna och besökarströmmarna. Allt mer resurser läggs på att, i samverkan mellan regionens viktiga aktörer, finnas med på den internationella spelplanen. För Stockholm gäller det därför att ha goda utblickar mot världen och våra främsta konkurrenter. Av den anledningen beslutade Stockholm Business Regions styrelse att utvecklingen i fem andra europeiska regioner skulle studeras lite närmare i ett benchmarkingliknande samarbete med dem.

De fem städerna/regioner som utvaldes är Amsterdam, Barcelona, Köpenhamn, Edinburgh och Hamburg. Städerna valdes därför att de på olika områden har likheter med Stockholm, att de har personal som vi lätt kan kommunicera med att de har både stark besöksnäring och intressant övrigt näringsliv och slutligen att de genom sin storlek konkurrerar på liknande nivå om internationell uppmärksamhet som Stockholm. Detta innebär inte att samarbeten med andra regioner/städer kring specifika frågor utesluts.

Den bifogade rapporten är författad på engelska för att underlätta avstämningen med våra kollegor i respektive stad.

Stockholm Business Regions synpunkter

Arbetet har bedrivits genom att fem utvalda personer inom Stockholm Business Region har etablerat kontakt med kollegor och utbytt material och besökt varandra. Under 2009 har muntliga rapporter delgivits styrelsen avseende fyra av städerna. Avsikten är att arbetet ska fortsätta och att bolaget ska ha kontinuerliga underrättelser om vad som sker i de fem studerade städerna.

Vissa metodologiska problem finns när det gäller att definiera vad som är en region, län osv. Utgångspunkten har därför varit det som EU definierar i sina statistikrapporter vilket innebär att t ex Köpenhamn används som synonym för hela Huvudstadsregionen och Stockholm avser länet.

Varumärket

Amsterdam, Edinburgh och Köpenhamn har i likhet med Stockholm valt någon typ av gemensamt varumärkesbudskap. De andra två städerna väljer att bara använda stadens namn. Det förefaller vara en trend att citybranding underlättas av ett gemensamt varumärke som är gemensamt för både investeringsfrämjande och besöksnäring. Amsterdam verkar ha nått längst gällande kännedom av sitt varumärke internt medan vi i Stockholm fortfarande har en bra bit kvar.

Organisation

Endast Stockholm har valt en helt sammanhållen organisation för kommunikation, investeringsfrämjande, näringslivsservice och besöksnäring. De övriga fem städerna har valt att ha dessa funktioner på flera olika huvudmän och försöka samordna arbetet på andra sätt. Detta innebär i sin tur att resursjämförelserna inte bara haltar utan blir svåröverskådliga. Det går att skönja en viss uppskattning, bland de andra städerna, av Stockholms mycket enkla och enhetliga organisationsform.

Samarbete med andra partners

Alla de jämförda städerna har olika typer av organiserat samarbete med näringslivet i dessa frågor. Vanligast är att man har samägda organisationer med näringslivet och andra partners där styrelserna består av olika blandningar av politiker, företagare och intresseorganisationer. Stockholm förefaller ha den mest renodlade modellen där staden ensam är ägare och övriga bidrar med olika typer av partneravtal.

Notabelt är även att man i många städer är djupt inblandade i driften av olika verksamheter som vi i Stockholm av olika lagstiftningsskäl inte anser att vi kan delta i, t ex är Barcelona stad delägare i flygbolaget Spanair.

Resurser

Stora problem uppstår när man ska kvantifiera vilka resurser som används inom detta område. Försök har gjorts att få fram siffror på hur mycket skattebetalarna bidrar med till marknadsföringsarbetet i respektive region utan att lyckas. En jämförelse med Stockholm skulle ju oäven för oss innebära svårigheter med avgränsningar mellan olika kommunala enheter och bolag som gör marknadsföringsinsatser, eventsponsring och dylikt. Det är ju ofta så att framgångsrika insatser kommer till stånd genom en samverkan mellan olika parter. Köpenhamn fick ett mycket stort tillskott i sin budget för marknadsföring i samband med COP 15- mötet förra året. Stockholms Hamnar AB gjorde en motsvarande insats genom att genomföra Volvo Ocean Race Stopover.

Slutsats

Det arbete som inletts har varit givande och stimulerande och bolaget avser att fortsätta detta samarbete med de utvalda städerna.

Det är givetvis vanskligt att dra några slutsatser av det som vi redovisar här men det bör erinras att det inte går att sälja vad som helst hur stor marknadsföringsbudget man än har. Stockholm har, trots allt annat, en mycket bra produkt med en av världens vackraste städer, ett välfungerande samhälle, diversifierat näringsliv, välutbildad arbetskraft och ett samhälle som, ännu så länge, är hyggligt förskonat från främlingsfientlighet.

En mycket försiktig gissning när man tittar på relationen besökare och investeringar (trots alla metodologiska problem) är att våra insatser ger rimlig utdelning.

Five Regions

Amsterdam

Amsterdam in short

Amsterdam is a city similar to Stockholm both in terms of size and number of tourists with 750 000 inhabitants in the city and 2.1 – 2.4 in the “Metropolitan Area”. The city highlights the following as their main strengths: geography (Amsterdam is situated close to both London and Paris and reaches some 160 million consumers within 500 km), infrastructure, culture, quality of life and cost of living. Amsterdam is home to some 1750 international companies and sees approximately 100 new companies establishing every year (according to Iamsterdam website). Amsterdam focuses on attracting companies within logistics, finance, ICT, life science, fashion & design, aerospace and perishables. Also, due to the favourable tax climate, Amsterdam succeeds to attract European headquarters.

Goals

The goal for the three organisations benchmarked is that Amsterdam should be one of the top five regions in Europe in terms of an international business location and in terms of being an attractive destination for international visitors.

Main actors:

Amsterdam Partners

AP is responsible for the marketing of the city and has succeeded extremely well with their brand Iamsterdam. Almost 100% of the inhabitants are familiar with the brand that stands for creativity, innovation and inspiration for business. The brand should only be used at events that have the same quality as the brand. A member group consisting of the largest companies was formed many years ago and is now a networking group that acts under the Iamsterdam banner. Every company that wishes to join the group needs permission and there is a demand for participating and for using the brand. AP has 5 employees and a budget of 2 million/Euro/year. The organisation is owned 50% by the business community, 50% by the city, regional local governments and regional promotion organizations. The largest companies are in the board, chaired by the Mayor.

<http://www.iamsterdam.com>

Amsterdam in Business

The employees at AiB are specialist in selling the region, guiding companies in the process of establishing and have an overall knowledge of the Amsterdam region. The organisation works together with Amsterdam Innovative Motor who employs specialists in certain sectors or themes. AiB has 12 employees and a budget of 0,8 million Euro/year for marketing, communication and events. The organisation is part of the City of Amsterdam's Economic Development Department. The board consists of the four economic directors from the municipalities around Amsterdam.

<http://www.iamsterdam.com/en/business>

Amsterdam Tourism and Convention Board

This is a limited liability company responsible for leisure and business tourism with five subsidiaries (Convention / Leisure / Product development & Research / Tourist shops). The city buys services from the subsidiaries to an amount of 8 billion Euro/year. They also get an

additional 2 – 3 million euro to attract events to Amsterdam. Amsterdam Tourism and Convention Board employ 100 people.
<http://www.iamsterdam.com/en/visiting>

Barcelona

Barcelona in short

Very often you talk about Barcelona before and after The Olympic 1992. This is also true regarding the change of the City as well within building new areas, new infrastructure and a new image of the City. Barcelona is the economic, cultural and administrative capital of Catalonia and is one the principal metropolises of Spain and the European Union. It is located on the shores of the Mediterranean, in northeastern Spain. Two hours from France by road and well connected to the major cities of Europe, Barcelona is in a strategic geographic location. With almost 1.6 million inhabitants and an area of only 100 km², the city of Barcelona has one of the highest population densities in Europe. As well as its registered citizens, Barcelona also attracts many visitors and tourists throughout the year. But the "real" Barcelona goes beyond the frontiers for the administrative city. Hence, the metropolitan region of Barcelona includes more than 160 municipalities with some 4.8 million inhabitants (10.7 % of the population of Spain).

Barcelona also acts as a centre of an "economic Euroregion", defined by the cities within 3 hours by road, with more than 17 million inhabitants. Barcelona airport have 32 million passenger and Barcelona harbor is also one of the biggest in Spain.

It is very difficult to compare figures and how they work because sometimes they work for Barcelona but often as the Capital of Catalonia. Today Barcelona is rank as the fifth biggest tourist cities in Europe with 13,5 million overnights.

The City has a very good homepage with a lot of information regarding investment, helping company to start up and of course a tourist/convention site. www.bcn.es
They also produce lots of statistics:
<http://www.bcn.cat/documents/datasheet2008.pdf>

Economic Promotion is the instrument that Barcelona City Council uses to stimulate the economic development of the city, which is very well organized in Barcelona Business and Barcelona Tourism. Sometimes very difficult to compare finances, example the Barcelona tourism has a turnover of 350 million SEK. Of this a huge part comes from commercial activities and ownership like tourist busses etc.

Copenhagen

Copenhagen in short

Compared to other Scandinavian capital cities, Copenhagen uses similar key selling points. Their focus is leadership within global growth sectors such as life science, ICT and cleantech. In addition, one less common area of focus is entertainment, which includes production of games and movies. An additional 6 500 000 Euros was provided by the city to their official budget in order to promote the cleantech sector during 2009. Quality of life, a productive and innovative workforce and a flexible labour market are other communicated strengths.

Goals

The overall strategy for Copenhagen is to become Scandinavia's leading scene for experiences. Other objectives include Europe's leading cruise destination and one of the top-ten congress cities. Copenhagen has also incorporated air traffic, and the successful positioning of the city as a major air hub, in their goals.

Branding

In April 2009, Copenhagen introduced a new brand after a long period of thorough analysis. Based on the concept of "open", the word is highlighted in the name COPENhagen. Open represents flexibility, possibilities and creativity and that Copenhagen is a place for everyone. The concept can be included in marketing towards tourist and business segments alike, and was conceived in close collaboration with stakeholders and the business community.

A politically oriented aim with the brand is to get political parties, the business community, municipalities and others to discuss questions regarding laws and society. There are fears that issues such as xenophobia and adverse opening hours have damaged the city's reputation.

Organisation

The two main organisations working to promote the city, Copenhagen Capacity (budget, approx 4 900 000 Euros) and Wonderful Copenhagen (budget, approx 14 000 000 Euros), were founded in the 90's and have about 100 employees in total. They are supported by up to 750 companies and organisations. Copenhagen capacity is mainly focused on attracting new businesses, only one out of ten employees work with actual businesses. The brand Open is owned and developed by a separate organization, partly owned by the business community.

www.wonderfulcopenhagen.dk

www.copcap.com

21 miljoner flygpax 2008,
13 000 hotellrum
510 000 inv/city, 1,6 milj inv/region

Edinburgh

Edinburgh in short

Edinburgh, is a city somewhat smaller than Stockholm in terms of size with 468 000 inhabitants in the city, 1.2 in the "City Region" but considerably larger than us on the visitor side with 13.9 million guest nights 2008. With regards to the business side; investments and congresses, Stockholm does however better than Edinburgh.

The City has launched a new brand Edinburgh – Inspiring Capital approximately the same time Stockholm launched Capital of Scandinavia. Main target groups and activities in: live, visit, invest, study. Edinburgh is as stated above successful in attracting visitors and has well known traditional "brands" (whiskey, golf, kilt/tweed, the highlands etc) but is actively working to broadening the offering and target new and "younger" audiences and to prolong the season. Traditionally the finance industry is very strong in Edinburgh and this continues even as the financial crisis has hit the world economy.

Goals

"The most successful sustainable City Region in Northern Europe by 2015"

- Outcomes 2011:
- Attract €600m (investment into physical regeneration)
- Attract €120 million in investment from companies
- Increase the gross value added of it's domestic business by 1% p.a. above the average
- Increased visitor spend by 15%

Main actors:

The City of Edinburgh Council/Edinburgh Economic Development (EED)

EED is in many ways similar to SBRD/SBR. It deals with Economic Development in a wide sense and also houses the Destination Marketing Team (DEMA). The task is "Shaping perceptions of Edinburgh in the target areas of visit, invest, live & work" and to "To tell interesting, inspiring and relevant stories about Edinburgh". They are the "owners" of the brand "Inspiring Capital" Budget for EED is 8.9 million € and it has 61 employees.

<http://www.edinburgh-inspiringcapital.com/>

Scottish Development International (SE)

SE is a combined Trade (export) and Investment Promotion Agency that represent the entire Scotland (incl. municipalities and regions). It also co-operate with UKTI which is the equivalent for UK as a whole. SE has 300 employees, 23 own foreign offices + UKT&I resources.

<http://www.sdi.co.uk/>

Visit Scotland (VS)

According to a new (2005) law municipalities in Scotland are no longer allowed to be active in destination marketing in the tourism and leisure area. VS Scotland has taken over this responsibility and even run local tourist offices across Scotland. VS has 86m€ i budget, 800 employees (100 in Edinburgh) and focus on the leisure segment. Municipals can however support this work and fund VS or other players. As an example Edinburgh City Council states that they in 2008 alone invested some 40 million € in tourism related activities some of them carried out by VS.

<http://www.visitscotland.com/>

Edinburgh Convention Bureau (ECB)

The official convention bureau of Edinburg is strongly supported by the City as well as the local industry. ECB has a budget of 900 000 €, has 14-15 employees, 1700 ambassadors and 130+ members

<http://www.conventionedinburgh.com/>

Hamburg

Hamburg in short

Hamburg is one of the most dynamic centres of the German economy, often titled as "Boom town". Metropolitan Hamburgs hallmarks are strong purchasing power, a good pool of potential employees and business friendly policies. Hamburgs character and image are heavily influenced by the divers architectural styles and waterfront activities of the city, the port, the warehouses of the Hafen city, the Binnen- and Aussen alster waterways, the river Elbe and the Cruise ships in the middle of the City.

The fact that Hamburg was elected as the Green Capital 2011 tells a lot about the environmental friendly approach of the city.

Goal of the city: "*Hamburg - the growing city*". The ambition is to reach 2 million inhabitants

Hamburg Marketing

Hamburg Marketing is the umbrella company when it comes to marketing Hamburg. The mission of the company is to manage the brand and coordinate the marketing activities of the city of Hamburg and the public marketing agencies, i.e. Hamburg Business Development, Hamburg Tourist board, Hamburg Fair, the harbour, the airport and Hafen City. The offering of the brand is; international trading Metropolis, attractive business environment, metropolis for living, amusement strip – Reeperbahn, vibrant scene/nightlife, city on the water, shopping, high-calibre cultural offerings, street fairs. In order to market Hamburg abroad the focus is on events that have an international audience and that is consistent with the Hamburg brand. The main target group is the Creative class i.e. creators and opinion shapers. The reason is the belief that "jobs follows people". 14 districts in the metropolitan region are included as Hamburg Marketing stakeholders with the mission to integrate Hamburg metropolitan region in the brand. Hamburg Marketing has 10 employees and a budget of 6-7 million Euros.

Hamburg Business Development

Hamburg Business Development is the investment promotion agency of Hamburg fully financed by the city of Hamburg. The company work very close to the industry and have developed networks within three clusters; logistics, civil Aviation and Media, IT & Telecom. The company has 35 employees and a budget of 3,5 million Euros.

Hamburg Tourist Board

Hamburg Tourist Board promote Hamburg as a leisure destination on 15 markets. The company work closely with the largest hotels and many projects are done in cooperation with the hotels. Their main money maker is the Hamburg City card and packet trips. The company also runs a call centre, sell tickets, offer hotel reservation services and run one tourist office of their own, but cooperate with three more. The company has foreign representatives in New York, Tokyo, London, Shanghai and St Petersburg. In total the company has 130 employees and a budget of 9,7 million Euros. The goal is to be among the top 10 cities in Europe with 15 million bednights.

Fact and figures - Benchmarking cities

	Inhabitants city/region	RGDP €/inhabitant * 2006
Hamburg	1,7 mil/ 4,5 mil	47 200
Edinburgh	468 000/ 1,218 mil	29 200 (Eastern Scotland)
Copenhagen	500 000 /1,2 mil	36 600 (Hovedstadsregionen)
Amsterdam	750 000 / 2,3mil	32 100 (Nord Nederland)
Barcelona	1,5 mil / 7,4 mil	29 000 (Cataluna)
Stockholm	825 000/ 2 mil	39 200

*Eurostat

	Foreign Direct investments* Ranking 2008	ICCA Int. conventions Ranking 2008
Hamburg	34	59
Edinburgh	98	28
Copenhagen	16	11
Amsterdam	12	7
Barcelona	4 (Cataluna)	3
Stockholm	14	8

*Ernst & Youngs European Investment Monitor by Oxford Intelligence Ltd

	Bednights 2008	No of hotelrooms
Hamburg	8 million	
Edinburgh	13,9 million	41 000
Copenhagen	6 million	
Amsterdam	7,7 million (in the city)	19 000 in the city
Barcelona	12,5 million	29 100 in the city
Stockholm	9,7 million	15 700 in the county

	Budget (total)
Hamburg	200 million SEK
Edinburgh	
Copenhagen	135 DKK
Amsterdam	128 - 138 million SEK
Barcelona	N A
Stockholm	