

Six regions

Amsterdam

Amsterdam is a city similar to Stockholm both in terms of size and in number of tourists. There are 780.000 inhabitants within the city and 1,3 million in the metropolitan area of Groot-Amsterdam. The city attracted 9.8 million available bed nights for 2011. 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 2,200 international companies and sees approximately 100 international companies establishing every year (according to Iamsterdam website). Amsterdam focuses on attracting companies within the following sectors: logistics, finance, ICT, life science, fashion & design, aerospace and perishables. Also, due to the favourable tax climate, Amsterdam succeeds to attract European headquarters. Amsterdam has been ranked as the 4th best city doing business in, according European cities monitor 2011.

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.

Amsterdam Partners

AP is responsible for international marketing of the city and has succeeded very 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 is only to be used at events that have the same quality as the brand. Amsterdam Partners is owned 50% by the business community and 50% by the city, regional local governments and regional promotion organizations. The largest companies are on the board which is chaired by the Mayor.

Amsterdam in Business

AiB is the official foreign investment agency for the Amsterdam Metropolitan Area. The organisation is part of the City of Amsterdam's Economic development department. The board consist of the four economic directors from the municipalities around Amsterdam. The employees at AiB specialise in promoting the region, guiding companies through the process of establishment within the city and have an overall knowledge of the Amsterdam region.

AiB works together with company Amsterdam Innovative Motor that employs specialists within certain sectors or themes.

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 and gets additional financial support to attract events to Amsterdam. The organisation employs 100 people who initiate and promote innovation and product development. They also work with worldwide marketing and promotion activities.

Berlin

Berlin is a dynamic, creative city and the capital of Germany with 3.5 million inhabitants and 6 million in the metropolitan area of Brandenburg. Berlin attracts millions of tourist arrivals each year, good for 22 million overnight stays in 2011. Berlin is a city state and focuses much on creative and cultural businesses. The capital is characterized by its turbulent past which can be seen by walking through the city and offer attractive residential regions with a unique landscape, rich in variety of cultural and leisure opportunities. The investors in Berlin have attractive benefits, such as development incentives which amount up to 50% of their investment. During 2001-2011, more than 1,200 companies invested in the capital.

BerlinPartners

Berlin Business Development Corporation and Berlin Partners Capital City Marketing merged in 2005, today known as Berlin partners. The organisation is the central contact agency for companies in Berlin. The agency is generating 1/3 of its financial backing from private companies and is commissioned by the Berlin Senate to develop and implement city marketing campaigns and business development strategies. The organisation has 5 main departments known as: business services, foreign trade, capital city marketing, support for Berlin partner member companies/events and PR/Corporate communications. BerlinPartners has 130 employees and approximately €20 million annual budget in 2011.

At present, BerlinPartners has more than 170 partner companies that work with the firm in a public-private partnership in order to enable growth in Berlin. The company has also a close relationship with visitBerlin and Brandenburg's economic development in order to exploit synergies and promote growth. The goal is to communicate the capital city's strengths and future prospects, positioning Berlin nationally and internationally as an innovative and vibrant location. This goal is supported by the capital city marketing campaign that was launched in 2008, "be Berlin" financed by the Senate and partners from Berlin business community. BerlinPartners are operating in Western Europe, North America, and Asia. A number of successful projects for Berlin in 2010 were 4,540 new jobs created with 105 projects (Greenfield and expansion).

Berlin Tourismus & Kongress GmbH

Berlin Tourismus & Kongress GmbH operates under the trade name visitBerlin and has been using it since 1993 to globally advertise Berlin as travel destination. visitBerlin's Convention office markets the German capital as a congress metropolis. Their aim is to promote tourism, business travel, trade fairs, conventions and congresses as well as providing visitors to the city with up-to-date information on what's going on in Berlin. visitBerlin tasks and activities are divided on six business units known as; Berlin convention office, market management, product & domestic marketing, customer service, corporate communication/strategic brand management and central services. visitBerlin employed more than 160 staff and had an annual budget of €15.3 for 2011. The organisation managed to achieve 300 marketing events in 30 countries worldwide and approximately 60 study tours for travel and congress organisations. In terms of marketing through social media, visitBerlin is quite active on different channels. Since May 2011 when visitBerlin engaged on Facebook with the promo "make it a million", the Berlin- page has been successful with more than one million fans among many European cities.

Copenhagen

Copenhagen covers an area of 74, 4 km², and a city much smaller than Stockholm in term of size and population, with 541,000 inhabitants in 2011 and 1.7 million people in the greater Copenhagen region. The bed nights in Copenhagen for 2011 were approximately 5.7 million. Copenhagen is an attractive city with an affluent lifestyle and rich culture, remarkable public transportation and famous for its monarchy. Copenhagen promotes green growth and has been the winner of the European green capital 2014; its goal is to achieve 50% of their citizens cycling to work or education thereby being CO₂ neutral by 2015.

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 €6.5m 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 flexible labour market are other communicated strengths.

Copenhagen Capacity/Wonderful Copenhagen

The two main organizations Copenhagen Capacity which has a budget approximately of €4.9 million and Wonderful Copenhagen with a budget approximately of €14 million are working towards promoting the city. The organizations were founded in the 90's and are financed by the greater Copenhagen authority involving board of directors consisting of regional politicians and business people. Further, the companies have about 100 employees in total and are supported by 750 companies and organizations. Copenhagen Capacity is mainly focused on attracting new businesses, only one out of ten employees work with established businesses referring to previous benchmarking report.

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. The brand Open is owned and developed by a separate organization, partly owned by the business community.

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.

Hamburg

Hamburg is a city state, one of Europe's most dynamic economic regions, often titled as "Boom town" within Germany. More than 4 million people live in the Metropolitan area and approximately 1.77 million in the city. In 2011, the bed nights spent in Hamburg were 9.6 million. Metropolitan Hamburg's hallmarks are strong purchasing power, a good pool of potential employees and business friendly policies. Hamburg's character and image are heavily influenced by the diverse 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. Hamburg is home to 140,000 enterprises and is most notable in the fields of port & logistics, life sciences, aviation industry, and media & IT, but also in sectors such as renewable energy, maritime industry and trade relations with Asia. Hamburg is the most international city in Germany with 400 Nordic companies and is the academic home of more than 80,000 students.

"Hamburg – The growing City" has been the political mission statement of the government 2004-2009. Since 2009 the focus was rather on responsible growth. And the new government, which took office in 2011, has not yet published a new political mission statement.

Hamburg Marketing GmbH

Hamburg Marketing (HMG) is the holding company for the two subsidiaries Hamburg Tourismus GMBH (HHT) and Hamburg Business Development Corporation (HWF). As with a new brand policy since 2012, "with one voice for Hamburg", the organisations were merged into HMG as a central marketing holding. The focus is on marketing Hamburg metropolitan area on business development and tourism. All the administrative tasks, corporate communications and PR activities are made out in the holding. HMG makes their own target groups analysis and that is the basis for their work – next to the brand survey and the strategic marketing plan. As before, they used to aim at the creative class i.e. creators and opinion leaders defined by Richard Florida. The HHT and HWF are still performing their operational tasks in co-ordination with the holding company. The Hamburg metropolitan region has now expanded and is now made of 19 districts and self-governing cities, originally there were 14 districts. Hamburg Marketing has about 50 employees and the operative project budget is around €2 million.

Hamburg Business Development Corporation (HWF)

HWF is the central point of contact and they offer a consultancy service for all industries. The company also drives the development of industry clusters such as; logistics, aviation, renewable energy, maritime industry, and Media, IT & Telecom. HWF main tasks are attracting international companies, supporting local business, cluster management and marketing the location. HWF's Shareholders are Hamburg Marketing GmbH, Hamburg Chamber of Commerce, Hamburg Chamber of Skilled Trades, Hamburger Sparkasse AG and Hamburger Volksbank eG.

Hamburg Tourismus GMBH (HHT)

Hamburg's Tourist Board promotes Hamburg as a leisure destination both in Germany and abroad. The company mission is expressed in its core statement: "Hamburg tourismus- *we bring life to the city*", aiming in supporting national and international leisure and business travel to Hamburg. Their goal by 2015 is to be among the top 10 cities in Europe with 15 million bed nights. The marketing of "Hamburg brand" is supported by foreign representative offices in New York, Tokyo, Stockholm, St Petersburg, Shanghai, London and Dubai and by the German

national tourist board. The Hamburg Convention Bureau Gmbh (HCB) is dedicated to positioning Hamburg as a location for conferences and business events.

London

London is a diverse, cosmopolitan city covering around 600 square miles, with a multi-cultural population of around 8 million. London is the capital of Great Britain and constitutes of 33 boroughs. Each borough has a cultural identity, Member of Parliament and local council taxes. London is a great tourist attraction and in 2011, the city attracted 46 million available bed nights.

London is home to some 20,000 foreign owned companies and the city is nominated to be the best city for doing business in Europe in terms of access to markets, customers, clients, availability of quality staff, transport links, quality of telecommunication and language spoken. An area of east London is known as the “Tech city”, launched in 2010 in order to create a world leading technology centre in London. Today, approximately 200 high tech firms are established within the area. The city is the heart of the financial sector and the district is dominated by stately buildings and skyscrapers. The financial services sector is a major source of overall employment in London.

London & Partners

London & Partners was created in April 2011, merged from 3 different agencies as follows: formerly Visit London which focused on tourism, leisure and business tourism; Study London which worked with attracting international students and; Think London that was the official FDI agency for London. Today, the different departments are known as leisure tourism, business tourism, FDI, major events, higher education. The main objective for the Mayor of London with creating this single agency is to promote London as one voice. Their goal is to position London as the world’s leading city, to support the objectives of the Mayor’s economic development strategy, and to deliver maximum value for London economy.

London & Partners is a public private founded organisation. The agency is generating 80% from greater London authority (city hall) and 20% from private sectors revenue. London & Partners have to review all the generated income from specific operations publicly. The 80% of public founding goes into attracting international businesses and overseas marketing and the remaining 20% goes to helping the local industry with the domestic market to grow in London and boost the local economy.

As previously mention, London & Partners works with attracting investors from overseas, those who will increase the economy and enhance the market within the specific clusters. From a FDI perspective, they are focusing on financial services, ICT, creative industries (from advertising to games), energy and renewable waste. Further, they focus more on Greenfield investments and on those sectors that create more value add to the developing economy and have recently started to integrate trade with their activities. London & Partners has 140 employees, 120 are based in London office. Their annual budget is £14 million and gets negotiated every 4 years.

In terms of benchmarking, London & Partners wants to make sure the way they promote London is differentiated from their competitive cities. The way London compare itself, depends on which factor they are looking at. For example in terms of reputation they tend to compare themselves with New York, Shanghai, and Paris. From FDI perspective, they would compare themselves with Paris and some destinations in Germany, Copenhagen and Dublin. From life science perspective, they look at Singapore and tourism would be other cities.

London official Convention bureau

London's official convention bureau sits within London&Partners, formerly visit London. They promote the capital globally as the top destination and offer event solutions for clients and event organisers, including assistance on planning meetings, conferences, events, exhibitions, incentives. Further, they bid to attract association congress to London. The company wants London to be recognized globally as the best big city on earth. From a leisure tourism point of view, the focus is on providing value to visitors.

St Petersburg

St Petersburg is considered to be one of the most beautiful cities in Europe with a special style and unique atmosphere. The capital has a total number of 4.8 million people inhabitants and a total area of 1,439km². St Petersburg attracts millions of visitors each year and in 2011, the city attracted approximately 6 million available bed nights.

The city has investment potential because of its geopolitical position, developed and diversified economy and efficient transport network. St Petersburg has one of the largest ports of the Russian federation, which processes 65% of entire exports of the country. Manufacturing is the leading industry in St Petersburg, which accounts for 42% of production volume in the city. Other important industries include the food sector and textiles.

St Petersburg Business development - CISP

The committee for Investment and Strategic Projects (CISP) is St Petersburg's agency created in 2003 dealing with issues related to: 1) Conducting the investment policy of Saint Petersburg and developing the investment attractiveness of Saint Petersburg, 2) Developing all forms of public-private partnerships, 3) Monitoring strategic investment projects which have importance in their social economic value, 4) Developing tourism, hotel infrastructure and the hotel management of Saint Petersburg.

The structure of the committee is divided by departments that relates to all investments, administration for public, private partnership projects and legal support and administration for tourism. In order to expand St Petersburg as an attractive business destination for investors, St Petersburg attends at large international events such as MIPIM, St Petersburg International Economic Forum, Expo Real and Transport of Russia. Further, the slogan "Saint-Petersburg - the open city" promotes convenient stimulation of business and investment activity and the shaping of a positive image for the city.

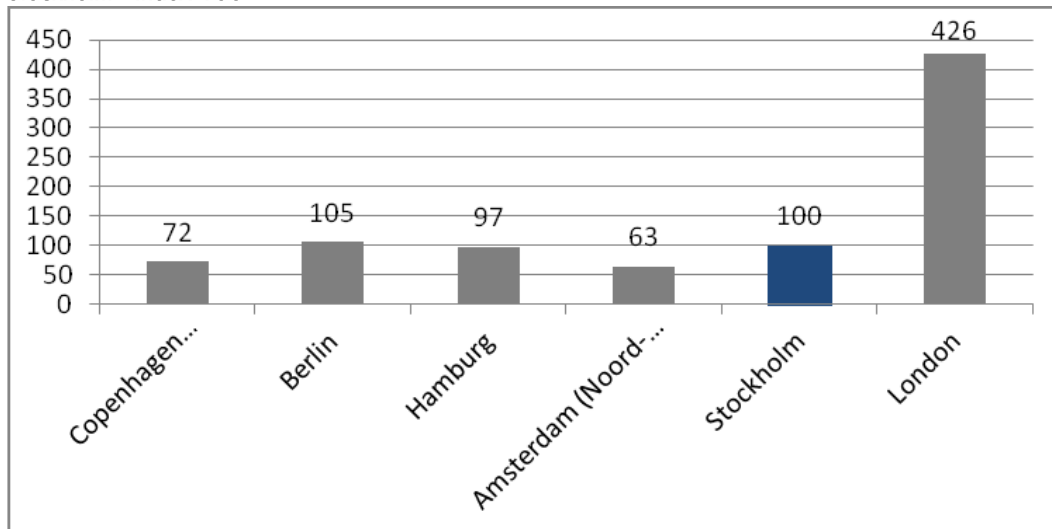
Tourism in St Petersburg has always been a developing area with a significant impact on the city's economy. The project tourist development of Saint Petersburg as a tourist centre and improvement in the tourist infrastructure during the period of 2005-2010, generated steady growth in the number of tourists visiting the capital. Today, St Petersburg has around 687 hotels with 33,736 hotel rooms located around the city. The tourism in St Petersburg is seasonal and all the tourist attractions and sights are placed in a very limited area. In 2010, St Petersburg held 145 exhibitions and traditionally St Petersburg has been represented in the top 10 tourist markets.

Fact and figures – Benchmarking cities

1. GDP

In general, Sweden has a very high growth rate compared to other European cities. Reviewing the benchmarked cities, London is by far the largest economy. Stockholm's regional GDP is almost on the same level as Berlin and Hamburg.

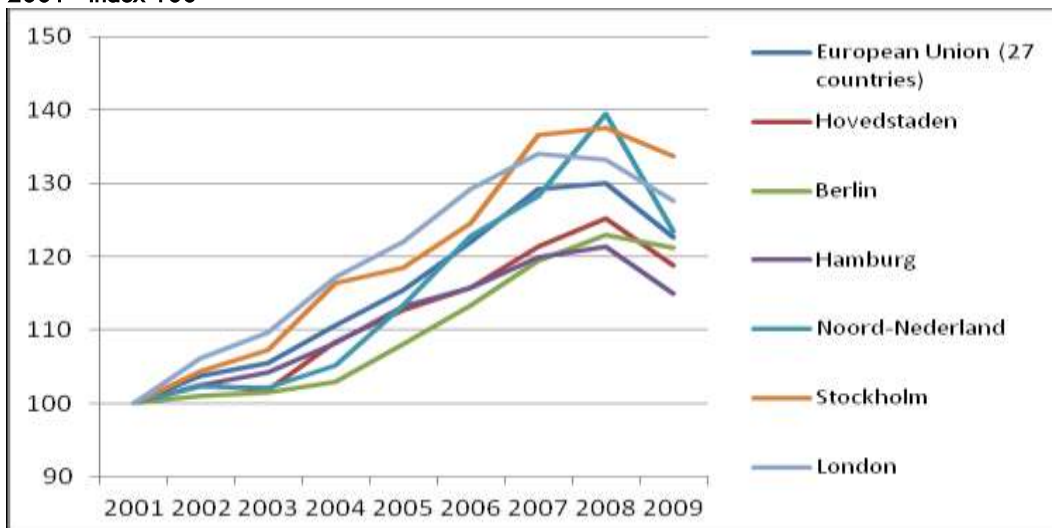
GDP, Millions of PPS (Purchasing Power Standard) 2009
Stockholm= Index 100



Source: Eurostat 2009

The economic development of our benchmarked regions shows us different performances over the period of time. Stockholm's RGDP has increased by 34% over the period 2001-2009. It is the strongest growth of all comparative cities.

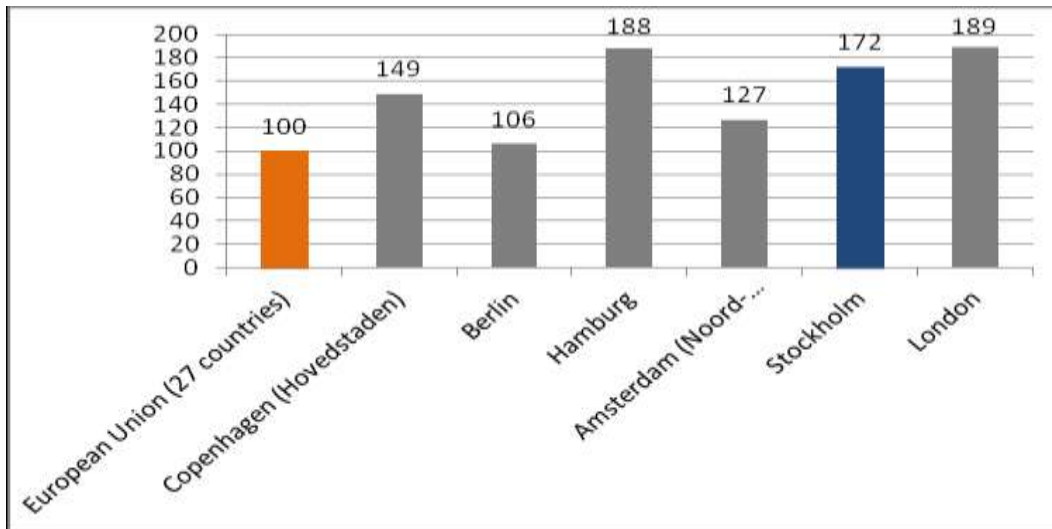
GDP, Millions of PPS (Purchasing Power Standard)
2001= Index 100



Source: Eurostat 2009

The highest BRP per capita was in London for the year of 2009. Stockholm's BRP per capita is 72% higher than the EU average and among the best in Europe.

Purchasing Power Standard per inhabitant in percentage of the EU average

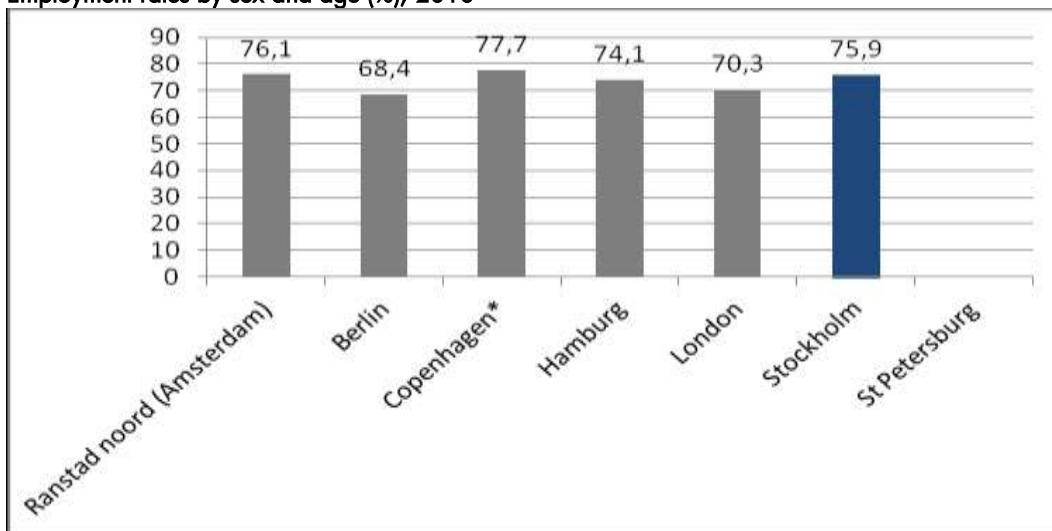


Source: Eurostat 2009

2. Labour market

The employment statistics has been calculated by employed persons, aged 15-64 and on NUTS3 regions. As can be seen from the table, Stockholm has a high employment rate, amongst Copenhagen and Amsterdam.

Employment rates by sex and age (%), 2010

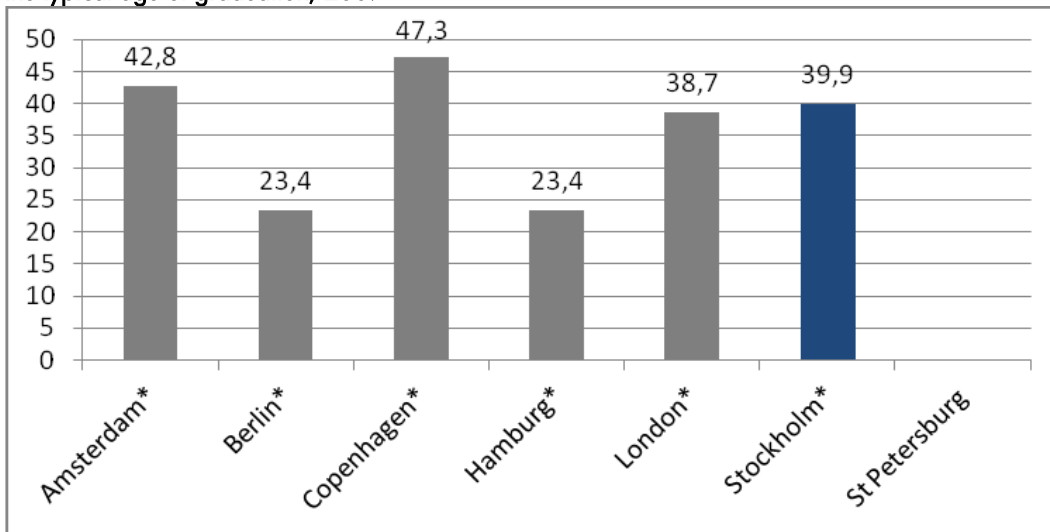


Source: OECD 2010

* 2009

The countries with high graduation rates at the tertiary levels is probably the countries with the highest skilled labour force. This figure shows that the proportion of the highly educated differ among our benchmarked cities. Stockholm has one of the highest graduation rates, almost at the same level as London.

Tertiary education graduation rates. Percentage of graduates to the population at the typical age of graduation, 2007

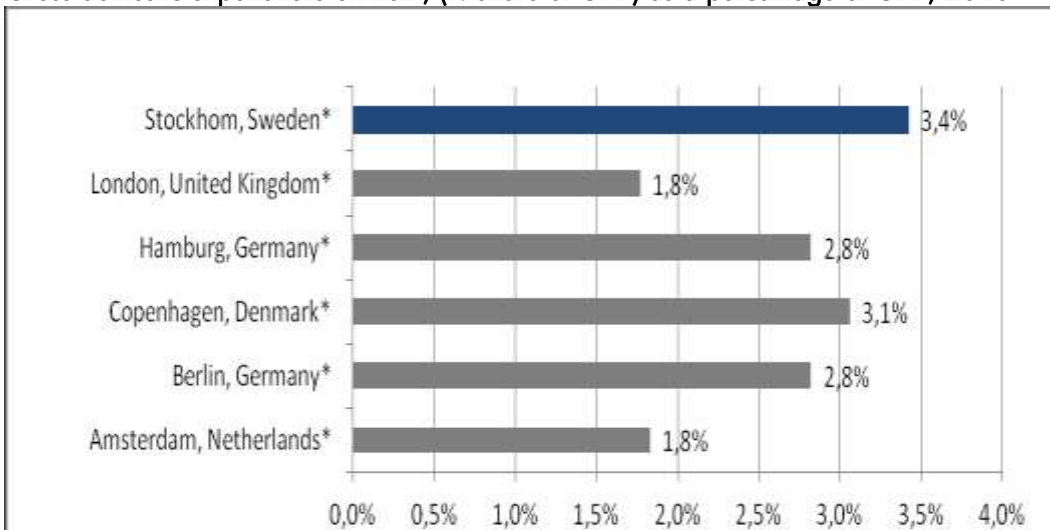


Source: OECD 2007
 *Figures refer to country

3. Innovation

The gross domestic expenditure as a percentage of GDP is conducted within the private and public sector. The EU set objective of devoting 3% of its GDP to R&D activities by 2010. Stockholm is the region that invests the most R&D in relation to GDP with 3,4%, closely followed by Copenhagen.

Gross domestic expenditure on R&D, (% share of GDP) as a percentage of GDP, 2010



Source: Eurostat 2010
 * Figures refer to country

4. Tourism

The highlight of the ICCA report for 2000-2011, indicates that Stockholm is an attractive destination among benchmarked cities. In terms of association meetings held in 2011, Stockholm is ranked as 13 with 93 meetings. The results show that Stockholm is one of Europe's top convention cities in terms of the number of delegates.

The Association meetings market

City	Rank	Rank
	Meetings 2011	Participants 2010
Berlin	4	4
London	6	27
Amsterdam	7	5
Copenhagen	11	16
Stockholm	13	3
Hamburg	27	36
St petersburg	41	

Source: ICCA 2000-2001

5. FDI

In terms of foreign direct investments, the inward activity in Europe has showed positive results. As previously mentioned London is nominated to be the best city for doing business in Europe and is dominating the ranking within our benchmarked cities. In Scandinavia, most of the foreign direct investments go to Stockholm.

Foreign Direct Investments

City/Admin Region	2011	Rank
Greater London	327	1
Noord-Holland	49	13
Stockholm	47	14
Copenhagen	30	26

Source: Ernst & Young's European Investment Monitor powered by Oxford Intelligence Ltd 2011