

#ProjectOsloRegion

# The Oslo Region Brand Management Strategy



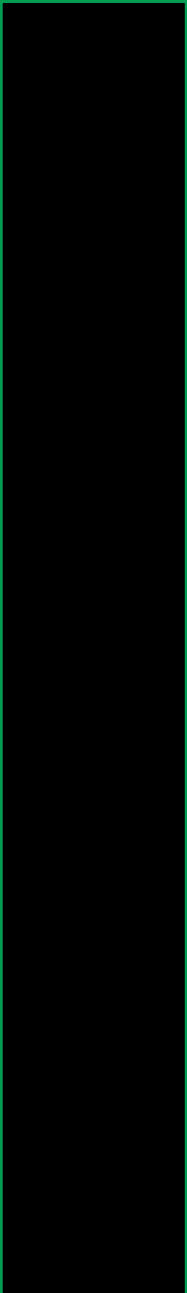


Photo: John Christian Fjellestad

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# The Oslo Region Brand Management Strategy:



Part I  
Adopted by the Steering Group on March 2 2015

# Invitation

This strategy is an invitation to you, a key Oslo leader or citizen, to join a collective effort to get the Oslo Region the international attention and recognition it needs and deserves.

Oslo is not yet well known by the world. As the global competition between cities intensifies, we risk being left behind. We need to respond.

The good news is that we have a lot to offer the world. Oslo can be globally competitive, and it is already attractive and full of opportunity. This place brand management strategy is about building our identity and finding our own voice; deliberately developing and demonstrating Oslo's values through appropriate and aligned actions. Such actions include investments in *our image, identity and reputation* (for example storytelling and media representation) and in *our reality* (for example infrastructure, services, and events). We want our collective efforts to be 'on-brand' so that we become more visible and better appreciated.

The first issue that might come to mind, is the "what's in it for me?". We want this place brand management strategy to give you a framework that helps your activities and stories to get sharper and 'on brand'. It provides a model of common purpose where you can find the level of interaction that suits you, as well as a clear picture of what will be done, both in the short- and long-term.

The content of this work is presented in three parts:

**Part 1: Strategy.**

A presentation of the Oslo brand, and the strategic choices we recommend.

**Part 2: Background and insight.** A deeper look into the process of work and analysis that has fuelled the strategy, and a broader description of place brand management and lessons learned from other cities.

**Part 3: The library.**

Where you can find every detail:

**projectosloregion.no.** Here you can download insight reports, interviews and workshops in full.

Our strategy has collaboration written all over it. We want you to join - Oslo can't succeed without you!

Kind regards,

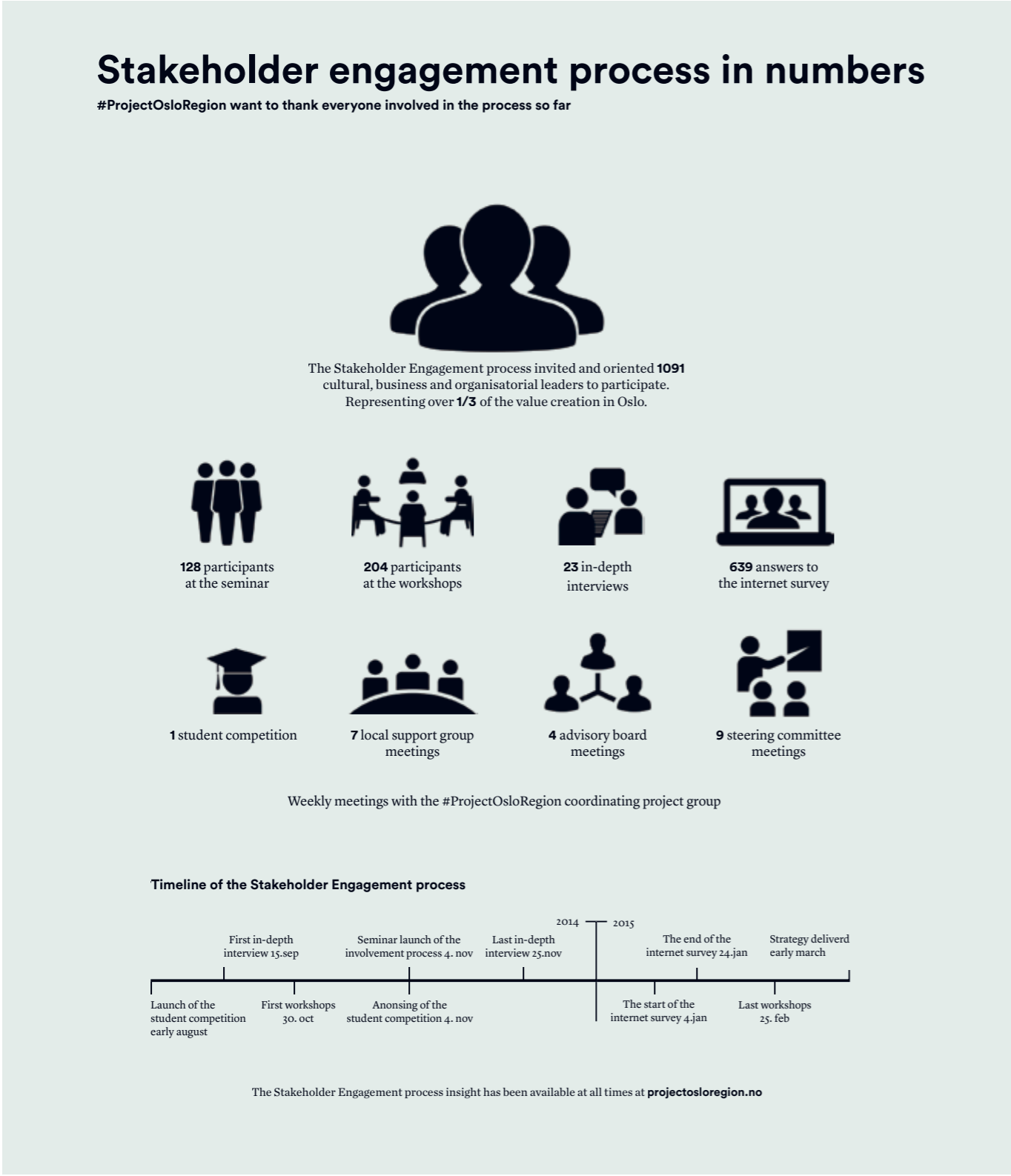
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# Stakeholder engagement process



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# Executive Summary

Nobody chooses Oslo by coincidence or by default, whether it be for investment purposes, employment, study, start-ups or travel. Today, we lack visibility. Oslo is not known by the world, yet more people would consider us if they knew we existed. We also lack a clear position; a more compelling brand would drive people to us. The brand platform below will work as an on-brand/off-brand filter for all stakeholders in the Region, and for improvements in both perception and performance



Our main goal is to make Oslo the world’s favourite compact city. Oslo is small enough to give people, companies and ideas visibility, and resourceful enough to be a pioneering springboard for growth and enriching lives.

## Sub-goals and KPIs:

- Increase visibility and buzz value
- Oslo associations internationally
- Increase attractiveness
- Generate more customers and visitors
- Attract more talent
- Attract more investors
- Improve hospitality services
- Increase local pride

## Strategic approaches:

- Digital pioneers
- Think young
- Future oriented events
- Show and tell - actions speak louder than words
- Lean: trial – experience – succeed
- Boost existing assets

The following areas are essential to strengthen the Oslo brand:

## Increased visibility

**IMPROVE**  
perception of culture

**BUILD ON**  
quality of life

**ENHANCE**  
business attractiveness

**INCREASE**  
hospitality performance

## Getting organised: Oslo Brand Alliance

We recommend that Oslo Business Region, Oslo Region Alliance and Visit Oslo form an Oslo Brand Alliance.

Existing division of labour:

- Visit Oslo: Marketing and promotion of Oslo related to travel and tourism
- Oslo Business Region: Promotion of the Oslo Region as a place to invest, start up, work, study and do R&D.
- Oslo Region Alliance: Building regional pride and cooperation with regional organisations in business, transport and urban development

Shared tasks:

- On brand/off brand evaluation of projects
- Back office functions with brand toolbox
- Establish “central hub” for new events to the region
- Shared intelligence
- Stakeholder interface and network arenas
- Initiate and develop profiling activities

This alliance will orchestrate the broad collaboration needed between public and private organisations in the region. A proposed funding model for the Region’s municipalities is a set fee per resident.

The Oslo Brand Alliance will motivate and mobilise everyone in the Oslo Region on different levels:

- Oslo Brand Leadership Arena: Bring together 10-12 key opinion leaders.
- Oslo Brand Partners: Regional municipalities and counties, together with key stakeholders within institutions, private and public sector, form the Brand Partners.
- Oslo Brand Ambassadors: All citizens to play their part.

## Timeline

- **Q2 2015:** The Oslo Brand Alliance to be formed, and start working immediately on shared tasks, within existing budgets.
- **Q2-Q4 2015:** Shared political processes to begin in Oslo and the Region’s municipalities and counties.
- **2016:** Public funding to be in place.

# 1. Oslo on the move

As Oslo’s population grows, the metropolitan region becomes more dynamic, integrated and internationally interdependent. This means that Oslo is developing a distinctive metropolitan character. It is no longer just a city with some wonderful neighbours; it is a region with a bright future. This brand management strategy makes the following assumptions:

## 1.1. Oslo is the brand

Place brand management acknowledges that the place itself is the brand <sup>1</sup>. Just like commercial brands, places contain meanings, and they signify a specific set of associations and values in the minds of people. And just like commercial brands, people identify with places both emotionally and rationally - they feel a sense of belonging, attraction, a desire to come and to stay. In this sense, it is the place itself (signified by its name), which is the brand, not a logo or a visual identity.

## 1.2. Oslo in a regional and global context

Unlike many brand strategies that focus entirely on an individual city, this strategy takes a regional approach. The aim is to include all relevant sectors in one strategy. If a strategy is a truly integrated cross-sectorial strategy, it is impossible not to include assets and stakeholders that are geographically outside the city borders but closely linked to the city. Another, and even more important reason, is that the Oslo Region is gradually becoming more integrated with respect to business structure, labour markets, housing markets, leisure and culture. The Region is in essence the same brand, at least when seen in an international perspective.

As a result, in this strategy Oslo is the sum of the local cities, counties and municipalities within the region - it is an *internationally* oriented brand. This has the power to bring visitors, customers and investors not only to Oslo and the surrounding region, but to Norway more widely, spreading opportunity to our neighbours and enriching the entire country.

In a domestic context, the different municipalities and counties within the Oslo Region remain brands in their own right as they each have different identities and offerings, and will be treated as such.

In a national context, our aim is to add value to our neighbours by bringing visitors and customers into the country, and by spreading opportunity across the whole family, enriching all of Norway.

## 1.3. Co-ordination – a team effort

There are currently several organisations and stakeholders involved in efforts to improve the Oslo brand. This is considered a strength in this strategy, as each organisation possesses valuable knowledge and experience. The aim is not to reduce the number of stakeholders and organisations that promote the Oslo brand, but to create a basis for better coordination between these efforts, while at the same time recruiting additional organisations and individuals to the cause of strengthening the Oslo Region’s international position.

We are building a platform for change, not a programme for change. Change comes naturally when individuals

have a platform that allows them to identify shared interests and to brainstorm solutions. We will encourage individuals to take responsibility for initiating the change they want to see and give them the resources and tools necessary to do so.

## 1.4. Show AND tell

Place brand management does not equal place marketing. To enhance the reputation of Oslo, we need to enhance both perception and reality. The place brand strategy informs the brand values and positioning of Oslo, which all products, services, promotional messages, propositions and experiences should reflect. The brand strategy should be read as a tool to evaluate all our actions, and not just promotional activities. It will act as an on-brand/off-brand filter for all stakeholders in the region.

## 1.5. Why Oslo shouldn’t rest on it’s laurels

Oslo is currently the fastest growing capital city in Europe, and the growth rate in the region as a whole is just as high. Unemployment is low, and the economy is healthy. It’s easy to lean back and think that everything is going well. If we don’t act now, from our position of strength, the challenge will be greater in the future.

In the past, many cities have first launched place branding initiatives when they experienced decline or while facing major shifts in their economy. In such situations, the sense of urgency is commonplace, but the resources and the possibilities are often more limited, meaning that there are simply fewer positive stories to tell in such situations.

From a place brand perspective, it is definitely better to act now, and use the current economic, demographic and political momentum to strengthen Oslo’s international position and tell positive stories with a clear narrative.

Stakeholders report a high sense of urgency in workshops and interviews, especially those companies and organisations in need of international manpower. The global competition for attracting the brightest minds has increased, both in private and public sector.

Moreover, a total of \$800 million was invested in Nordic start-ups in 2014 <sup>2</sup>, but only 3.22% went to Norwegian companies. There is a clear need to increase Oslo’s visibility in order to attract investors.

In an economy less reliant on oil revenue, we need to develop a diversified and robust economy. Oslo will play a key role in international business development.

In sum: the window of opportunity to give Oslo a more visible and recognised international position - is now!

<sup>1</sup> Boisen, M. (2011). The selective nature of place branding.

<sup>2</sup> Teknisk Ukeblad February 21, 2014.

## 2. The Oslo Brand

Nobody chooses Oslo by coincidence or by default, whether it be for investment purposes, employment, study, start-ups or travel. Today, we lack visibility. Oslo is not known by the world, and more people would consider us if they knew we existed. We also lack a clear position - more people would choose us if we had a compelling brand.

When defining the brand, it has to be simple, crisp, an attempt to pin down the compelling essence of Oslo. If you try to say it all at once, you end up saying nothing.

A common framework is needed to communicate Oslo so that we can work together as team. Without a common framework all municipalities, universities, firms, associations, journalists, and others communicate different ideas, concepts, and propositions, and the result is that Oslo becomes less distinct and visible. The more messages, the worse the overall message is. To handle this, we have created a brand filter. Vital building blocks informing the brand development have been:

- How we see ourselves, through workshops, interviews and questionnaires
- How others see us, through international benchmarks
- Looking for what is both unique about Oslo and appealing to the world

The brand filter below should work as an on-brand/off-brand filter. No matter who your target group is. No matter what your business is. Your stories and actions have the potential to be on brand!



2.1. Vision: the best is yet to come!

The vision for Oslo is an expression of a genuine and positive orientation to the future, which we want to share with everybody, and which we invite everybody to become part of.

It is our true belief that the best is yet to come. In contrast to many other European cities, we have a very strong economy. We rank high on creativity, and the population in the region is relatively young, with rapid growth of 25 – 35 year olds. We have a blooming start-up scene, and plenty of untapped potential.

The best is yet to come!

2.2. Oslo’s brand values

Brand values must be honest; they are not something we can adorn ourselves with as they are experienced every day. In the search for a true Oslo identity, we have found values that are representative of the people in the region, recognised by foreigners, and which differentiate us from other places. The values are not meant to be communicated or designed as slogans. Instead, they must guide our actions and communications, and, together with the vision, act as the main filter to differentiate between what is on- or off-brand.

PIONEERING (BANEbRYTENDE <sup>3</sup>)

Oslo is progressive, determined and ambitious. We might be small in numbers compared , but we punch far above our weight. Oslo’s population is among the highest educated in the world, and the region hosts some of the world’s leading industries and companies.

Oslo people are early adopters of new technologies and devices. Entrepreneurs are the new rock stars, and new sectors are being rapidly established. Today, Oslo is Europe’s fastest growing capital, and the region is, in contrast to many others, experiencing economic growth. In several areas, Oslo is being recognised as progressive and creative <sup>4</sup>.

As Norwegians, we have a pioneering history, from explorers like Roald Amundsen, Fridtjof Nansen and Thor Heyerdahl, to more recent Norwegian Nobel laureates within economics (1989) and physiology/medicine (2014).

To be pioneering will influence our actions in many ways. In a communications perspective, we all need to be digital pioneers in 2015. This does not mean that all actions must be digital. We will certainly act in the real world as well. But going to a conference, means that you have to have your social media strategy in place, and create the buzz Oslo needs.

ENRICHING (BERIKENDE)

Life in Oslo is about the possibility to realise your individual potential within the safety of the region’s caring society where everyone has the right to succeed. Oslo is safe, and has stable and predictable governance. Safety fosters freedom: freedom of mind and freedom of action. You do not need to worry about life necessities; you can focus on realizing your potential. Oslo provides an environment in which value is created and shared.

A good work-life balance is an integral part of our culture, and it is possible to have a two-career household with children – one does not have to be chosen over the other.

Oslo enables and supports personal growth not only through the work-life balance, but also through a vibrant cultural scene, ethnic diversity, and a unique proximity to nature. Here, work and play go hand in hand.

REAL (EKTE)

People in Oslo are down-to-earth, informal and straightforward. The institutions and businesses are characterised by flat structures and transparency. There is a freedom of speech, and every voice can be heard. “What you see is what you get”. People are trustworthy, reliable, and direct.

We appreciate authenticity, and we put actions behind words. We have many stories of excellence within high quality production, and products: from the world’s best coffee culture, to sub-sea high technology.

Norwegians are seen as industrious people <sup>5</sup>, as the global public considers them ‘hard-working’, ‘honest’ and ‘skilful’, and these Norwegian connotations are nowhere more valid than in Oslo.

You can *feel* it when something or someone is real, and it is a deeply valued quality.

2.3. Goal: The world’s favourite compact city

Oslo is not a big city by international comparison. Yet, we see our size as an asset, not an obstacle. Oslo has short distances:

GEOGRAPHICALLY

Oslo is a world-leader in terms of its physical and transport infrastructure. Total commuting time is one of the lowest among competitive world cities <sup>6</sup>, and this enables inhabitants to have a high quality of life.

Oslo is one of just five of European cities in which more than 90% of its citizens have both cultural facilities and green spaces available.

HIERARCHICALLY

Norway is an egalitarian society with flat hierarchies and power structures that do not keep management and employees estranged. Norwegians often work across hierarchies rather than imposing boundaries. The leadership style is informal, and is based on employee freedom with responsibility. Norway also has transparent business and governmental processes.

SOCIAL MOBILITY

Norway has high social mobility. In the Inequality of Opportunity Index 2014 pioneered by Francisco Ferreira of the World Bank, only 2% of Norway’s already low inequality can be explained by birth. By contrast, in Brazil a third of the country’s high-income inequality is due to people’s background. America is closer to Brazil than to Norway. In other words, everybody can make it here in Oslo.

CULTURALLY

Our cultural muscles are bigger than our size should imply. Oslo holds close to 5,000 live concerts a year, more than double that of Stockholm and Copenhagen.

Small is the new big. Oslo is small enough to give people, companies and ideas visibility, and resourceful enough to be a pioneering springboard for growth and enriching lives. Oslo’s compactness is a unique quality, and we aim to make Oslo the world’s favourite compact city. It is an ambitious goal, but an achievable one.

2.4. Oslo brand position: the young, pioneering city

All cities around the world have to attract young people, as they are the future. Yet no city has really developed a brand position that is tied to young people. As this strategy must benefit Oslo in the long run, a “young” brand position will be valuable.

The population in Oslo is relatively youthful, and getting younger. A striking younger population wave is facing Norway <sup>7</sup>, with a 23% growth of 25-35 year olds over the next ten years. This trend is even more pronounced in Oslo, with a potential 40% growth in this age group.

<sup>3</sup> Banebrytende (definisjon): som er helt ny og som åpner for nye muligheter, som viser vei for andre.  
<sup>4</sup> <http://martinprosperity.org/2013/08/14/insight-creative-and-diverse-ranking-global-cities/>  
<sup>5</sup> The Anholt-GfK Roper Nation Brands Index™ 2014 Report October 2014

<sup>6</sup> [www.bot.com/advocacy/Documents/Scorecard/Scorecard\\_2014.pdf](http://www.bot.com/advocacy/Documents/Scorecard/Scorecard_2014.pdf)  
<sup>7</sup> TØI report 1378/2014

Oslo therefore has the possibility to take up a position as the *young pioneering city*.

- The position has not been actively taken by any other city
- It is true for Oslo, given the growth rate of younger people
- It is true for Oslo from a historic perspective, as we are a relatively young world city

The younger population is well educated, and is given huge opportunities to take responsibilities within business and culture. The number of young and highly educated people has created a thirst for innovation, and we are early adapters of new technology.

Our values - pioneering, enriching and real - should fit into the aspirations of the younger generations.

Will Oslo still be a city that appeals to the not so young? Of course! The city is open to all, and has always embraced all age groups. However, on the global scene we will prioritise the young in our activities and messages.

2.5. Strategic approaches

We see six important strategies for everyone to follow, in order to get on-brand:

DIGITAL PIONEERS

This is a 21st century approach. We will prioritise digital channels to communicate Oslo to the world. We will leverage digital communities to garner intelligence on Oslo and to keep it real. We aim to be digital pioneers of city branding.

This is not a criticism or replacement of face-to-face actions, but is instead a farewell to costly, inefficient, traditional media.

THINK YOUNG

To position Oslo as a young, pioneering city, we will focus on young targets (including those young at heart) and young voices in branding Oslo internationally.

FUTURE ORIENTED EVENTS

To be on-brand, events within politics, sport, culture and businesses must be curated as future oriented, not 'last year' or 'me too'. They must instead be known as the place where 'you heard it here first'.

SHOW AND TELL

Actions speak louder than words. Getting the attention and recognition Oslo needs is not a marketing game alone. Every stakeholder – public and private – must be pioneering about identifying actions that can really tell the Oslo story and make us stand out in on the international scene. The unique physical transformation of Oslo's waterfront, with the Fjord City urban renewal project, exciting new architecture, new cultural arenas and public spaces is just one example.

We must be bold and real. Actions have a bigger viral potential than marketing ideas alone. Improving the city is the best marketing we can do.

LEAN: TRIAL – EXPERIENCE – SUCCEED

Being lean in the way we work with the brand management of Oslo is essential. This implies that we:

- Undertake a lot of small activities instead of rushing it all at once
- We experiment more, and replace the notion of 'trial and error' with 'trial – experiment – succeed'<sup>8</sup>
- We measure effects continuously through digital tools

BOOST EXISTING ASSETS

We will identify and boost existing assets in the brand management of Oslo, as we have found that these assets are already strong. For example, the opening of the new Munch Museum is an easy opportunity as a coordinated and cooperative effort to be on-brand and to be boosted by many partners.

2.6. Sub-goals and Key Performance Indicators (KPIs)

We want to give Oslo attention and recognition on the international stage through an increasing number of on-brand activities involving all stakeholders. The overarching goal is to make Oslo the world's favourite compact city.

Sub-goals and KPIs to achieve this are:

- INCREASE VISIBILITY AND BUZZ VALUE**

  - Increase digital footprint by 20% per year
  - Increase Oslo's presence in international rankings from 50<sup>th</sup> place
  - Increase media presence, with emphasis on under-communicated areas
  - Increase the number of visiting international journalists
- GENERATE MORE CUSTOMERS AND VISITORS**

  - Align with Visit Oslo benchmarks
- ATTRACT MORE TALENT**

  - Improve position in rankings
- ATTRACT MORE INVESTORS**

  - Improve position in rankings
- OSLO ASSOCIATIONS INTERNATIONALLY**

  - Increase the percentage of on-brand activities based on 2015 measures
  - Perception of the Oslo story (young pioneering city, compact stage)
- BETTER HOSPITALITY SERVICES**

  - Improve position in rankings
- INCREASE LOCAL PRIDE**

  - Conduct a study of residents
- INCREASE ATTRACTIVENESS**

  - Increase average score on attractiveness barometer
  - Define 10 international rankings to be the leader in

We also want to create values that increase Oslo's international influence. We do not recommend this as a direct sub-goal, but increased visibility and buzz, increased attractiveness and the right Oslo communications should indirectly increase Oslo's international influence (as a door opener at least).

A balanced scorecard for sub-goals and KPIs will be developed to enable us to keep track of our progress.

	Increased vivibility and buzz value	Oslo associations internationally	Increased attractiveness	Generate more customers and visitors	Attract more talent	Attract more investors	Better hospitality services	Increased local pride
Value > X								
Value < X, > Y								
Value < Y								

2.7. Tone of voice, and mode of action

Everything we do, we must communicate.

Our values must guide how we perform, deliver and communicate Oslo internationally. Does this feel real? Is this pioneering? Are we enriching something or someone? Does it speak the language of the younger generations? Is it future oriented? In sum, is it on-brand?

<sup>8</sup>The expression is from "Urban Express" by Per Schlingmann and Kjell A. Nordström 2014

To be real, we need to communicate as human beings, not corporations. Our language must be the opposite of emptiness. To be real, we must be personal.

We talk to human beings, not to vague markets or abstract target groups. In the era of web and mobile communications, we are still able to meet individuals and be sincere with them. Today, more people have access to mobile phones than to toothbrushes.

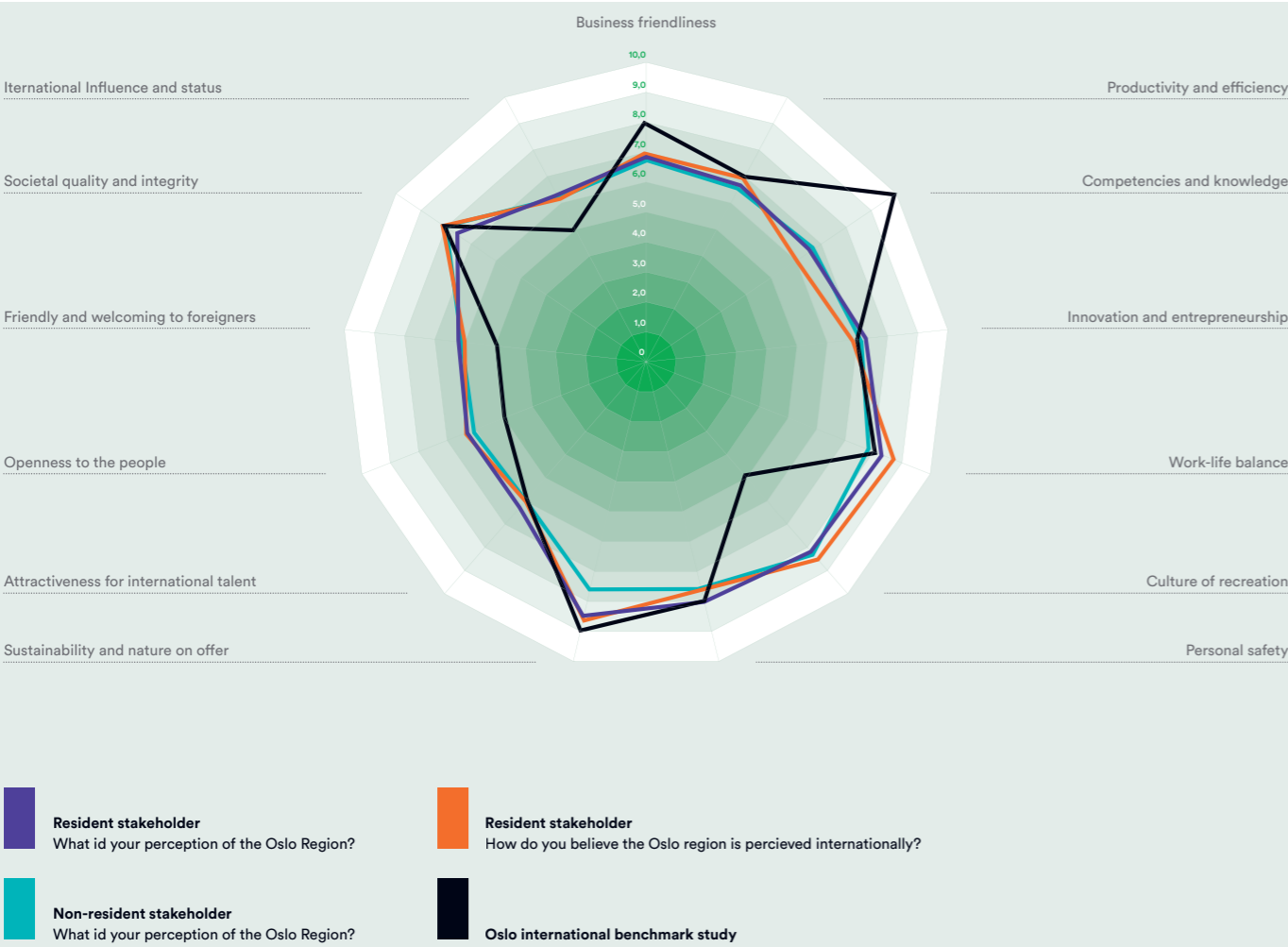
Personalised media (digital media in combination with meeting places/events/face to face) should be at the core of all brand promotions. We must also enable and encourage all citizens to share their Oslo with the world. They are essential co-producers of the Oslo brand.

As pioneers, we need to be ground breaking in our activities and our communications. Other cities might have more financial resources than Oslo has, or they are benefitting from an already well-known and well-established brand.

**2.8. The perception of Oslo today**

Closing the gaps between the international perceptions of the Oslo Region and how the Oslo Region actually performs is essential. However, within certain areas that are directly linked to Oslo’s attractiveness, closing perception gaps are not enough. The performance gaps and how they are addressed, also plays a decisive part in successful positioning. This strategy does not, however, address performance gaps in general.

The spider gram below is an illustration of Oslo’s overall performance (using a benchmark study) in comparison to the perceptions of Oslo residents and the international community, in thirteen categories. It illustrates a widely shared and little disputed picture of the challenges, strengths and weaknesses of the region.



Since investment, business location and tourism and travel will be strategically important for the Oslo Region in the years ahead in relation to the need to transform and develop Oslo’s and Norway’s economic base. As a result, it is natural to emphasise these themes in the strategy.

The following areas are essential to strengthen the Oslo brand:

Increased visibility			
IMPROVE perception of culture	BUILD ON quality of life	ENHANCE business attractiveness	INCREASE hospitality performance

**2.8.1. INCREASE VISIBILITY**

The world admires Oslo for its quality of life, government and stability, but many governments, businesses and individuals appear reluctant to participate directly in Oslo’s success. In 2014, Oslo’s international projection and outreach was rated only 50th out of 135 world cities. The IESE Business School notes that Oslo is one of a group of cities – including Seoul, Chicago and Osaka - whose international reputation is not as strong as its local assets.

We have studied over 50 international indexes and benchmarks in which Oslo appears <sup>9</sup>. When looked at as a whole, Oslo is currently only half as visible as Stockholm and Copenhagen in European or global comparative measures of city performance and perception. This in itself is indicative of the city’s limited presence and perceived importance among creators of global city assessments.

One of the most stated, and most often agreed upon conclusions from the workshops, is that Oslo needs to get its story told.

It is also important that we are Oslo specific in building this visibility. Oslo both benefits and suffers from being associated with the national brand of Norway. There is a need to distinguish Oslo from the Norwegian tourist brand of trolls, nature and fjords, and to take the more deserved role as an international city with great urban qualities.

**2.8.2. BUILD ON QUALITY OF LIFE AND GOVERNANCE**

Quality of life and governance are the two themes where perceptions largely align with performance, and are where Oslo is strongest. This is especially the case for’ personal safety, sustainability and resilience, work-life balance, quality and integrity, and transparency and reliability. Strengthening and honing these areas is therefore an easy step in building Oslo’s brand.

It is important to bear in mind that Oslo is globally regarded as a desirable place to live, rather than necessarily as a place to visit or do business. As a result, quality of life and governance must be made interesting and relevant in this context. Our existing strengths alone do not do enough to attract the best talent, investments, entrepreneurs and visitors.

**2.8.3.IMPROVE PERCEPTION OF CULTURE, LEISURE AND RECREATION**

Culture, leisure and recreation is a dimension of “Quality of life”. Oslo is one of just five European cities that satisfy more than 90% of its own citizens with both the cultural facilities and the green space available <sup>10</sup>. However, this cultural dimension is the weakest (seen from the outside) within a generally strong theme category of liveability. Moreover, international assessments identify culture as an arena for improvement in Oslo.

Although individuals may have many different reasons to want make the decision of coming to a city or a region, it is now widely recognised that locations within culture, leisure and recreation, as well as schools, day-care, ef-

<sup>9</sup> International benchmark study by Prof Greg Clark & Dr Tim Moonen, The Business of Cities Group, London, 2015.  
<sup>10</sup> [http://ec.europa.eu/regional\\_policy/sources/docgener/studies/pdf/urban/survey2013\\_en.pdf](http://ec.europa.eu/regional_policy/sources/docgener/studies/pdf/urban/survey2013_en.pdf)

We therefore need to do more to showcase Oslo's existing cultural appeal. Oslo is a small capital by any standard, but still holds more shows per capita than any other city in Europe. Hosting some 5.000 live performances a year, double the number of Stockholm or Copenhagen <sup>11</sup>.

#### 2.8.4. ENHANCE BUSINESS ATTRACTIVENESS

The business sector in Norway should perform on par with the most advanced business communities in the world. Competence is a decisive factor. In order for the business sector to succeed, and for Oslo to perform better in this area, the Region needs to improve its supply of world-class talent. This can be achieved by being attractive to highly skilled workers from other parts of the world, as well as improving the quality of the higher education system in the Oslo Region.

### 2.8.5 INCREASE HOSPITALITY PERFORMANCE

The challenge within this theme has most of all to do with the services, the attitudes, as well as legal and practical aspects that influence the choice to come and live, study or work in the Oslo Region. This is, in other words, primarily a question of performance. Improved services for visitors, foreign students and ex pats, are crucial to improve the Oslo Region's international position, and pave the way for new businesses and opportunities.

A place offers a different proposition in different markets. The key is to have more alignment of basic brand values across these markets.

It is important to understand what the 'hygiene factors' are and what makes us special for different types of customers. Too many companies and organisations identify unique selling points that in reality are hygiene factors. We must always look for what really motivates different target audiences.

It is the Oslo brand filter that defines our unique place in the world. Every little thing we do, we must do it in the Oslo way..

20

What you are chosen for at the end of the day.

What you are measured against.

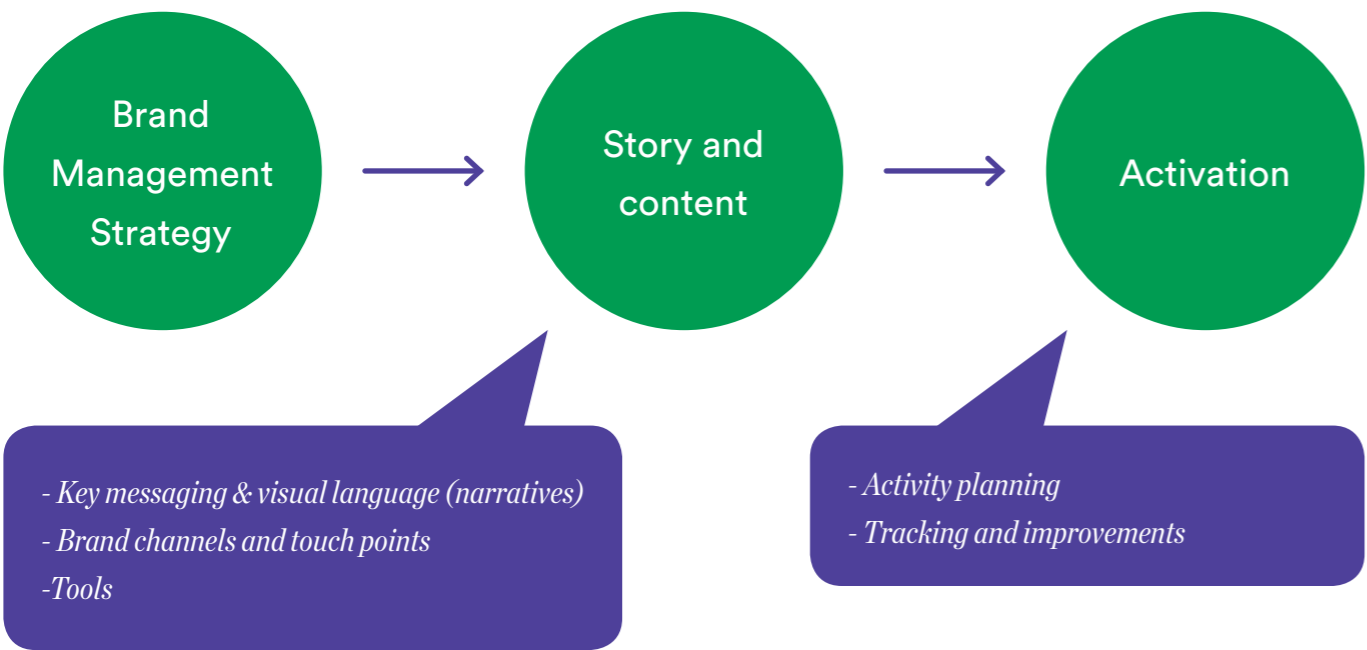
If you don't have this, you are simply not an alternative in the category.

# The Oslo Brand

# 3. From strategy to action plan

The Brand Management Strategy is the first step in the process of giving Oslo more attention and recognition. The brand platform can already be used as a filter for various activities and communication, to be evaluated as on-/off-brand. At the same time, stakeholders are eager for the strategy to go live.

The immediate next steps are:



We explain how this will proceed below.

## 3.1. Getting organised: Oslo Brand Alliance

Oslo already has a number of organisations with responsibility for international marketing. We recommend that the following three organisations form a Brand Alliance:

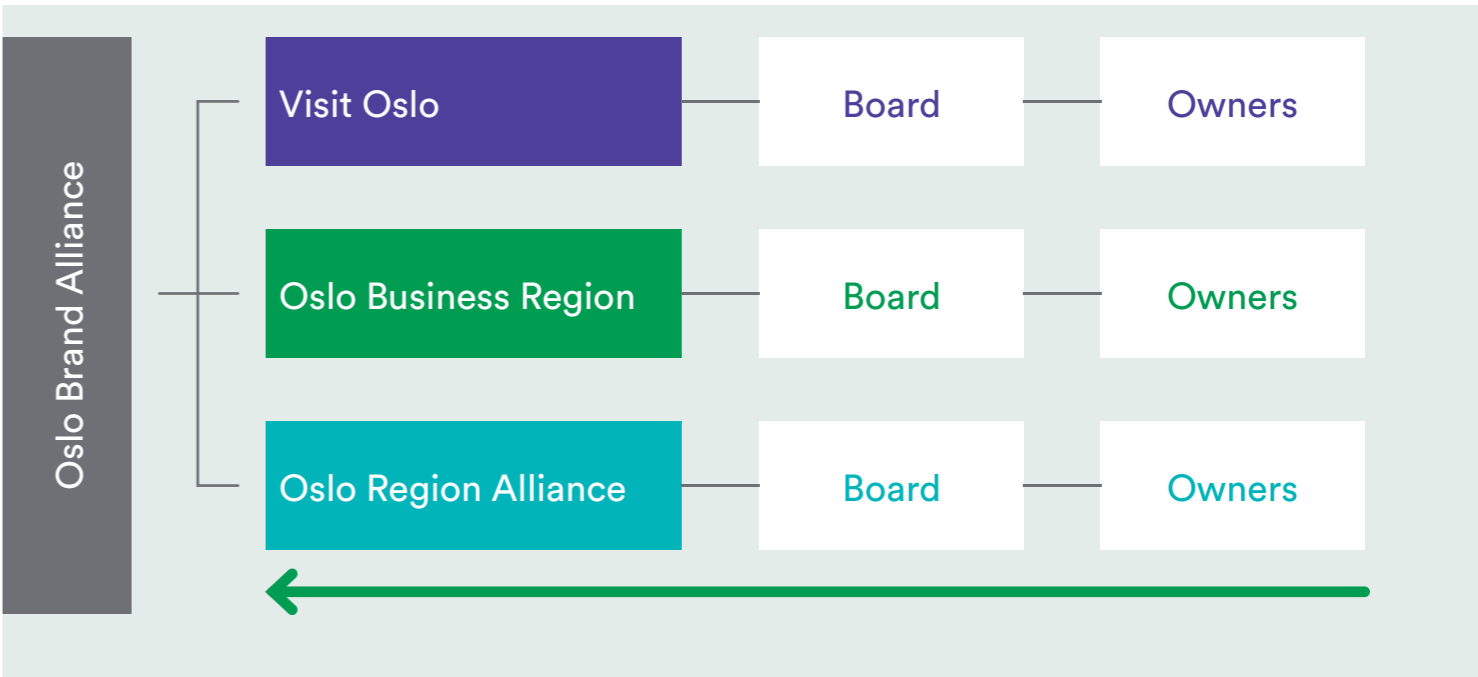
- Oslo Business Region
- Oslo Region Alliance
- Visit Oslo

These institutions have established mandates and resources central to Oslo’s brand management, and already cooperate with many regional and national bodies concerned with the marketing of Oslo and Norway worldwide. These three institutions will form a common agreement on plans and budgets for the Oslo Brand Alliance.

A Brand Alliance means that we do not have to start up a new body, which would bring with it considerable costs. Rather, we suggest the three organisations form a team and build up Oslo’s capabilities together. In order to comply with formal prerequisites, secure transparency and accountability, decisions on economic transactions related to this Brand Alliance will need to be resolved as one of the first steps.

It is imperative that the city of Oslo takes an active leadership role, and is represented on different levels.

As such, we propose the following decision structure:



The existing division of labour amongst the three organisations:

- Visit Oslo: Marketing and promotion of Oslo related to travel and tourism
- Oslo Business Region: Promotion of the Oslo Region as a place to invest, start up, work, study and do R&D
- Oslo Region Alliance: Building regional pride and cooperation with regional organisations in business, transport, urban development

Proposed shared tasks within the Oslo Brand Alliance:

- On-brand/off-brand evaluation of projects
- Back office functions with brand toolbox
- Establish “central hub” for new events to the region
- Intelligence collection and dissemination
- Act as a stakeholder interface
- Initiate and develop profiling activities

The alliance will orchestrate the broad collaboration needed between public and private organisations in the region. This will be done through back-office services and strategic projects.

3.1.1. PERMANENT FUNCTIONS: BACK-OFFICE SERVICES

The Brand Alliance must provide back-office services - permanent functions and tools everyone can use that are not developed or owned by one single entity. This is a public task - single organisations neither can nor should develop these.

These services will include intelligence (insights about Oslo), competence and training (on-brand/off-brand knowledge and marketing expertise), network arenas, and a shared toolbox:

The Oslo Story	Develop the Oslo story aimed at: Students Visitors Inhabitants Businesses
Brand Filter	On-brand/off- brand filter and a practical checklist based on the Oslo brand.
Content	A library of stories to underpin the Oslo brand for everybody can use in the form of text, photos, videos, infographics.
Sub-goal tracking	Develop a dashboard to keep track of sub-goal development.
Events	Establish an ‘event central hub’, a single point of contact to receive and evaluate on-brand poten- tial of all event inquiries.

3.1.2. STRATEGIC PROJECTS

The Brand Alliance must initiate projects within the strategic focus areas:

Increased visibility			
IMPROVE perception of culture	BUILD ON quality of life	ENHANCE business attractiveness	INCREASE hospitality performance

Each project will have a project group with participants from the Brand Alliance and the Brand Partners, and an action plan that includes:

- Goal
- Lead partner
- Description of activities
- Intended outputs
- Timescale
- Budget and funding

3.2. A participatory and shared approach

Everybody can benefit from an Oslo that is more visible, more recognised, and more celebrated. We will take an ‘open club’ approach, where everyone can join. It will be a partnership between private and public organisations.

At the same time, the basic principle for each network meeting is that people both contribute and are inspired. It has to be worth everybody’s time, as this is a voluntary collaboration. We will arrange well organised meetings that are action oriented, where attendees get something back in return for participating.

On the basis of these basic principles – action, contribution and inspiration - we will motivate and mobilise everyone in the Oslo Region, who will participate in one of three main ways:

3.2.1. OSLO BRAND LEADERSHIP ARENA

We will create a space for 10-12 key opinion leaders in the region to give the Brand Alliance advice on the devel-  
opment of permanent functions and strategic projects.

3.2.2. OSLO BRAND PARTNERS

Key stakeholders within institutions - both private and public sector - together with regional municipalities and counties form the Brand Partners. Everybody within this group is invited to join, and we expect the highly motivated to join first – a group that will grow over time.

The strategic projects will be a co-funded by public and private organisations, and will be negotiated on a project-by-project basis. An additional proposed model is for the region’s municipalities to pay a set fee per resident, as is the case for Stockholm (see part 2).

3.2.3. OSLO BRAND AMBASSADORS

We want highly visible citizens in the arts, sport, business, creative industry, science, and diplomacy to be brand ambassadors. They will act to communicate the story of Oslo in places where key decisions are made.

This invitation will extend to all citizens of Oslo. We want people from Oslo who love the region and want to play a part in telling its story to just about anyone they meet to be involved.

Essentially, everyone can play a part in making Oslo’s character visible, and we invite all of the people of Oslo - of all ages and interests - to join us in this.

3.3. The Oslo story

In our region, many public and private organisations will promote Oslo internationally, both through actions and words. We will orchestrate and coordinate these stories better than we do today.

At the same time, we need some shared branding actions to get the alliance started.

What could the first collaborative on-brand story about Oslo be?

As we have had a co-production of the strategy, we will have a co-delivery of communication initiatives. The first on-brand story about Oslo should be a task of the Brand Alliance (increased visibility), – but we want to invite you today to start thinking about a possible idea: the Oslopolitan. The idea is still only on the sketchboard – and the question for you is this:

Can your organisation employ the Oslopolitan idea?

We want to engage our citizens and friends all over the world in sharing and being part of the Oslo brand story. One possible idea is Oslopolitan.

Oslopolitan is a new word, and we can define its meaning. In our minds, Oslopolitan = Oslo + metropoli-  
tan + cosmopolitan.

Metropolitan gives us the regional dimension. Cosmopolitan is being at home in the wider world. It means having the willingness, the competence and the tolerance to understand, host and live among oth-  
ers.”

Oslopolitans are not just people who live in Oslo, - they are the champions and friends of Oslo, people who want it to flourish and shine. Some of them do not live in Oslo but they know and love Oslo. It is a ‘way of life’, not just a place.

Does Oslopolitan have the potential to tell our brand story both at home and abroad, with a long-term perspective, on different platforms, inviting different people to be a part of the story?

Can your organisation be part of the idea, and bring it into play, on a small or large scale?



# 4. Good starts

Many regional branding initiatives operate in a slow and bureaucratic way. In Oslo, this should be avoided. The coalition of organisations that will work together is already clearly visible, and there is an immediate agenda of key priorities that is already known and understood. We propose to start immediately, whilst we also pursue more momentum and resources for the future.

We choose to start today, and do everything that is worthwhile and doable immediately. Collaborative activities that will be started in 2015 (as they are already part of on-going business and mandates) include to:

- Establish the Oslo Brand Alliance through the CEOs of each entity.
- Establish the Oslo Brand Leadership Arena, inviting 10-12 key opinion leaders.
- Establish intelligence: a shared knowledge centre for all organisations that work with positionin (monitoring, research, stats, etc.).
- Develop a shared campaign, introducing our story.
- Develop narratives for the brand toolbox.
- Start network arenas.
- Develop a shared international media contact list
- Produce an event strategy and protocol (which events, how to support them)
- Create a strategy for leveraging brand assets and mega events.
- Improve positions in global rankings.
- Initiate strategic projects.

The strategic action lines will guide all activities:

- Digital pioneers
- Think young
- Future oriented events
- Show and tell
- Lean: trial – experience – succeed
- Boost existing assets

## 4.1. Taking Oslo a step further: 2016-2020

Once the brand management strategy for Oslo is approved, there are more tasks ahead of us:

- Establish ambition level, KPIs and budget
- Put in place a budget, fees and a funding model
- Develop a detailed communications strategy
- Develop activity and a marketing plan (coordinate stakeholder efforts, and plan for own international activities), and fulfil it
- Build digital tools
- Build a shared learning/best practice arena (both physical and digital)
- Coordinate Oslo's story to the international press
- Establish an on-brand/off-brand advice service

Of course, not every single action, policy, investment or event of the city will be fully ‘on-brand’, and some will even be ‘off-brand’. Nevertheless it is important that the key stakeholders realise and identify which of their numerous activities have significant impact on the brand they wish to realise. Only then can they choose the right ‘on-brand’ activities, and schedule them in such a manner that they have the most impact and build on each other for cumulative impact. This can only be achieved if all of the city’s key stakeholders are fully conversant with the brand and have learned what it means to be ‘on-brand’ in their decisions, actions, communications and behaviour.

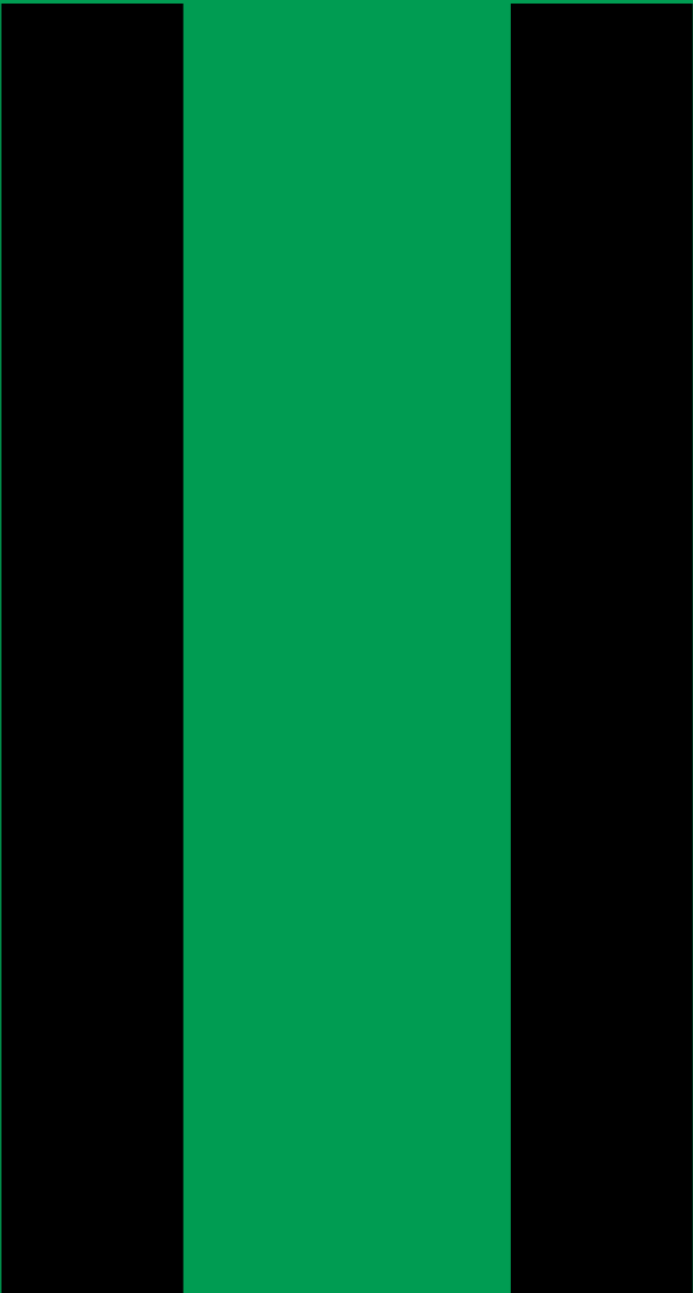
This requires a good deal of training of stakeholder staff to impress on them what it is they can contribute to realising the Oslo brand. A continuous conversation needs to be facilitated by a back-office system with competent people with access to both private and public stakeholders, making sure that each network combines both inspiration and contributions.

## 4.2. What now?

The momentum for giving Oslo a more visible and recognised international position is with us. The snowball has started rolling, and the suggested Oslo Brand Alliance partners already have existing mandates to cooperate in this area. Many ideas and initiatives, in cooperation with stakeholders, can begin without any further ado.

At the same time, some decisions need political approval, regarding both the direction of the strategy and the public funding. This process is underway, and will include Oslo municipality together with all the Region’s municipalities and counties. Public funding should be in place for full start up in January 2016.





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# 1. Introduction

## 1.1. Background to the Project

Two parallel initiatives have led to one strategy project:

**The region:** The board for The Oslo Region Alliance<sup>1</sup> (Osloregionen) decided in March 2012 to start work on a common platform for shaping the international position of the Oslo Region. The purpose was to establish a common understanding among municipalities, counties, business organisations and other stakeholders in the region to collaborate around the brand of Oslo. The first phase resulted in a report identifying the relevant stakeholders, the existing efforts to strengthen the region's international visibility and position, and the experiences of other regions who have already engaged in place branding and international positioning<sup>2</sup>.

**The city of Oslo:** The city of Oslo has been working on a separate initiative to strengthen the Oslo brand internationally. In the proceedings for the 2013 budget, the City Council of Oslo adopted the city government's proposal that it should produce strategies designed to profile the city and develop its attractiveness.

During the spring of 2013, it was decided that the Oslo Region project and the city of Oslo project should be merged into one project. In a letter from Oslo's Department of Culture and Business Development to Oslo Teknopol IKS dated November 14<sup>th</sup> 2013, the deliverables in the joint project were described as follows: Produce a strategy for international profiling of the Oslo Region, a plan for action and a plan for the future organizing of profiling activities.

The newly established business development agency, Oslo Business Region<sup>3</sup>, was given the responsibility to develop the strategy on behalf of the city of Oslo (after Oslo Teknopol IKS was terminated at the end of December 2013), together with the administration of the Oslo Region Alliance. For 2014, both the city of Oslo and the Oslo Region Alliance allocated funds for a joint budget and established a joint project group responsible for developing the strategy.

**The strategy project has taken the name #ProjectOsloRegion.**

When this project was initiated, international positioning through brand management was a largely unknown field in the Oslo Region. Since its establishment, the project group has discussed how the strategy should be structured with the steering group. The project group has gained experience from other cities and regions about criteria for successful profiling, and also sought advice from professionals with vast experience in this field. Additionally, the project has received input from stakeholders with vested interests in the Oslo brand. This has led to adjustments in the approach for the strategy process along the way. **The main objectives are however unchanged: To improve the Oslo Region's ability to attract talent, investments and business; to strengthen stakeholders' influence through international cooperation; and to build a stronger basis for regional cooperation through international positioning.**

This strategy focuses on the need to strengthen the Oslo Region's brand. As explained in later chapters, closing the gaps between international perceptions of the Oslo Region and how the Oslo Region actually performs is essential. However, within certain areas that are directly linked to the Region's attractiveness, closing perception gaps are not enough - performance also must be improved.

This being said, it is also important to stress that this strategy does not address performance gaps in general. It goes without saying that all municipalities, counties, universities, cultural institutions and private companies are constantly working to improve the quality of their services and products. This process of continual improvement is a result of each organisation's own decision-making processes. In the counties and municipalities these are results of democratic processes.

During the course of this project, the understanding of the relation between what the brand is and how it can best be strengthened internationally has evolved. As a result, this strategy will not offer a de-

tailed plan for promotion or marketing. We will describe examples of narratives and actions, but development is not possible until the strategic choices for brand management are in place. This is therefore a value based strategy.

On the 19<sup>th</sup> of December 2014, the Steering Group decided that the strategy should not include a concrete proposal for a new organisation. This strategy therefore focuses on the possibility of implementation through existing structures and organisations. The need for a new organisation should, however, be considered in the future; this will be a separate process.

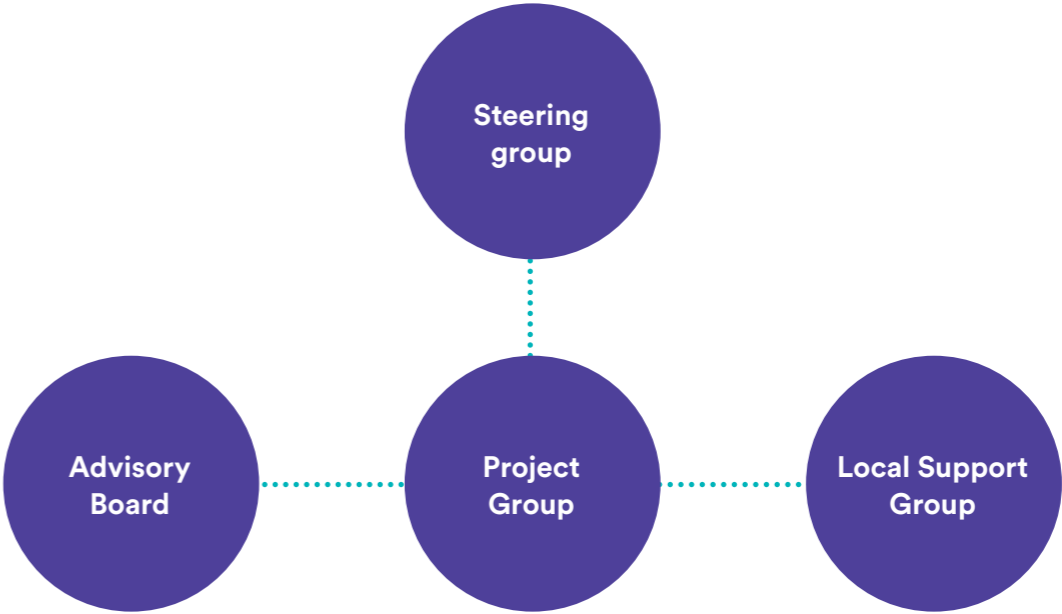
The strategy is divided into three parts. Part 1 is the actual strategy document. This is written with both private and public stakeholders in mind and should be read as an invitation to join forces to improve the

international position of the Oslo Region. Part 2, which you are reading now, contains the theoretical and empirical basis, as well as the deliberations, that support the proposals in Part 1. Part 3 is the web based archive, where you will find minutes from workshops and interviews, reports, studies, surveys and other documents which are referred to in this strategy: [www.projectosloregion.no](http://www.projectosloregion.no)

## 1.2. How ProjectOsloRegion has been organised

The strategy project has been organised with a steering group, an advisory board, a local support group and a project group.

Figure 1: ProjectOsloRegion project structure



The Chairperson for the Steering Group has been Vice Mayor for Culture and Business Development, Hallstein Bjercke, from the City of Oslo. The Vice Chairperson has been the Mayor of Lunner, Harald Tyrdal. The other members were Vice Mayor for Østfold County Council, Per Inge Bjercknes; Mayor of Drammen, Tore Opdal-Hansen; Chairman of the Committee for Planning and Business in Akershus County Council, Solveig Schytz; Chairman of Oslo's International Office, Erna Ansnes; Assistant Director General for Section for Business Development Oslo, Jan Fredrik Lockert; and Managing Director for Visit Oslo, Bente Bratland Holm.

The Chairperson of the Advisory Board has been Prof Greg Clark (Chairman, The Business of Cities). The Vice Chairperson for the Advisory Board has been Martin Boisen (BOISEN - For the Love of Place). Other members of the Advisory Board have been Erling Fossen (Oslo Meteropolitan Area), Mateu Hernández Maluquer (Barcelona Global), Hilde Charlotte Solheim (Virke), Karin Gjerløw Høidahl (Innovation Norway), Cathrine Synnes Finnskog (Music Norway), and Geerte Udo (Amsterdam Marketing).

Managing Directors Øyvind Sâtvedt (Oslo Region Al-

<sup>1</sup> For more about the Oslo Region Alliance see: [osloregionen.no](http://osloregionen.no)  
<sup>2</sup> [osloregionen.no/wp-content/uploads/proj\\_2013-06-14\\_aktorkartlegging.pdf](http://osloregionen.no/wp-content/uploads/proj_2013-06-14_aktorkartlegging.pdf)  
<sup>3</sup> For more about Oslo Business Region see: [oslobusinessregion.no](http://oslobusinessregion.no)

liance) and Fredrik Winther (Oslo Business Region) have led the Project Group. Sâtvedt has had the role as Chief Coordinator within the Project Group. Other members of the Project Group have been Bjarte Frøyland, Einar Kleppe Holthe, Marit Hartmann and Erik Hansen. Additional help has been assigned to the project from Oslo Business Region Interns Anne-Marie Nikolaisen and Karin Skansen, as well as writer and researcher Kari Nøst Hegseth.

The project has also drawn on input from a Local Support Group consisting of administrative officials from the City of Oslo and other municipalities, counties and regions. The group has consisted of: Anja Husa Halvorsen (Akershus County Council), Marit Høvik Hartmann (Olympic Bid Organisation OL2022), Liss Kristin Steinbakk (City of Oslo), Malin Gjellestad (City of Oslo), Bjarne Haslund (City of Oslo), Marthe Elin Hoddevik (City of Oslo), Morten Bastrup (Asker municipality), Rino Larsen (Øvre Romerike Utvikling), Geir Petterson (Fol-lorådet), Bjørn Johansen (Indre Østfold utvikling), Kjersti Garberg (Oslo Region European Office), Ingar Vaskinn (Kongsberg municipality) and Kathrine Mosfeld (Visit Oslo).

For more information about the project structure, see <http://www.projectosloregion.no/om-prosjektet/prosjektorganisering/>

The project has procured assistance from different consultancy firms. Kreab Gavin Anderson together with SAHR have been the lead consultants with responsibility for designing the process for the involvement of stakeholders, as well as delivering input to the strategy document. Additionally, Gambit Hill & Knowlton has been responsible for stakeholder analysis, Geelmuyden Kiese has been responsible for a PR/media strategy for the project, and Øystein Fossen has assisted in setting up and organizing workshops with stakeholders.

In addition to this, the project has had assistance from the independent international advisors Greg Clark and Martin Boisen, as well as Brandlab Oslo in the finalizing of the strategy.

### 1.3. Benefits of Urbact/CityLogo

The City of Oslo is a partner in the project City-Logo within the Urbact program <sup>4</sup>. Participation in the CityLogo project has been coordinated with the strategy project.

CityLogo is a network on Innovative Place-Brand Management that has been launched as a reaction to the most common gaps in the way cities and regions address branding and marketing. The rationale is that city-branding should be embedded in broader and participatory processes of re-thinking urban identities to be then filtered by urban-driven communication codes, resulting in more powerful brand-toolkits. In addition, more effective formulas for stakeholder involvement and management should be widely promoted. A multi-dimensional task fed by different perspectives and local agents, with a clear strategic scope.

Thru Urbact CityLogo, **#ProjectOsloRegion** has been given insight in theoretical perspectives as well as experience and from other cities in Europe about integrated city branding. Representatives from the project group have participated in several workshops and study trips.

**#ProjectOsloRegion** has also participated in a peer review process, which resulted in valuable input to the further development of the strategy document.

The peer review of a draft plan for the Oslo Region strategy and process was conducted on **August 28 2014** with participation from Utrecht, Vilnius, Zaragoza, Genoa and Warsaw. Lead expert for URBACT CityLogo Miguel Rivas produced a review with recommendations for the further development of the project. **At this time, the actual strategy document was still in very early stages.**

These are some of the input from the peer review:

- There should be more content on both Oslo’s main assets and policy experiences carried out in the last year –for instance, mentioning some sector-oriented relevant practices, like VisitOslo.
- Global assessment of the Oslo’s preliminary draft is very positive, and some points are addressed brilliantly. It’s solid basis to approach the final draft.
- Oslo has wide range of assets and emerging process still poorly known for many from abroad), hence the impact of a sound strategy in city-brand can be very significant indeed. That is, a more cohesive narrative together with a dedicated management model to both keep such narrative fresh and coordinate communication efforts from different stakeholders.
- “The problem formulated in the LAP is clear” (Utrecht, Warsaw) as well as the main challenge (Vilnius, Zaragoza).

- “The goals as well as institutional framework conditions are well defined” (Warsaw). “Vision and goals are clear enough” (Zaragoza).
- “In order to get all the potential partners visible, Oslo tends to spend 6 months on getting a good view. This should be something other cities could learn from. It takes a lot of time, but it’s an investment for the better. The right partners should feel involved” (Utrecht).
- Oslo is now embarked in a truly relevant process of brand building and the city should carefully avoid a conventional type of process or fall into any of the most common gaps. You have “lots of eyes on you” (Genoa).
- Make a choice on a few concrete actions for the next years, instead of considering a too broad, exhaustive list of steps and initiatives. (Vilnius)

### 1.4. The brand is ‘Oslo’

This strategy is based on an ambition to strengthen the international position of Oslo and the Oslo Region through improved place brand management activities. **#ProjectOsloRegion** is based on the conviction that the brand not only should represent the place, but actually be the place.

In a global context, the multitude of places and place brands is a major challenge when it comes to adopting a strong international position. It is very difficult to introduce brands that are not already known and recognised to some extent.

This brand management strategy is consequently about Oslo, with ‘Oslo’ being the name of the brand, not an administrative entity.

‘Oslo’ is here defined as the common international brand for the Oslo Region as whole, including the geographical area that is defined by the membership in the Oslo Region Alliance, today and in the future.

It should be noted that this is an international brand. In a domestic context, the different municipalities and counties within the Oslo Region are brands in their own right.

This brand management strategy has the ambition of including all relevant sectors - public and private - within the Oslo Region, defined as an integrated place brand strategy. (Braun & Zenker, 2010).



### 1.5. Methodology

**#ProjectOsloRegion** has been developed through an extensive methodology. Given the ambition of the project to serve as a common strategy for regional stakeholders with a vested interest in the international position of the Oslo Region, as well as form the basis for effective actions to improve Oslo’s international position, a strong emphasis has been put on including representatives of relevant stakeholders.

The project has also emphasised the use of international experience, theory about place brand management, and empirical sources that document Oslo Region’s development, performance in comparison to international cities, and its international perception.

**#ProjectOsloRegion** has adopted a policy of openness. Background documents for the project have been published on the open project webpage: [www.projectosloregion.no](http://www.projectosloregion.no)

<sup>4</sup> <http://urbact.eu/citylogo>

### 1.5.1. STAKEHOLDER ANALYSIS

An extensive mapping of stakeholders in the Oslo Region has been undertaken by Gambit Hill & Knowlton, resulting in a stakeholder analysis report <sup>5</sup>. The stakeholders are here defined as businesses, institutions, organisations, elected representatives and prominent personalities with a clear stake or interest in the region's international profile. This may be in relation to attracting competence (labour and students), business (investments, establishments, R&D) and visitors (tourism and professional travel) or more generally enhancing awareness of the region among potential international partners.

In assessing stakeholders, the report has emphasised that stakeholders represent the population as a whole, but have primarily been selected for their potential impact in the project; priority has been given to stakeholders that can serve as a channel to a large number of interested parties within their segment. Gambit Hill & Knowlton identified the need to include stakeholders that represent the following industries:

- Maritime
- Offshore
- Renewable energy and environment
- Metal and material
- Finance
- IT
- Knowledge based service
- Real estate and construction
- Tourism
- Retail trade
- Health
- Culture
- Education and research

In addition, the report also includes a list of the most important stakeholders within each sub-region outside the city of Oslo.

The project group has chosen to supplement the stakeholder report from Gambit Hill & Knowlton with key actors and individuals that are representative of important existing brands, especially within the sectors of culture, design, media and cuisine. Together, these actors and individuals are believed to be important 'identity carriers' on behalf of Oslo.

In addition, representatives of businesses and important institutions outside Oslo have been included based on local knowledge of the member organisations in the Oslo Region Alliance. The Project Group has also invited members of business clusters, networks and organisations to participate.

Based on these sources, a total overview of key stakeholders has been established, which includes approximately 1,400 names of individuals throughout the Oslo Region.

### 1.5.2. INVOLVEMENT OF STAKEHOLDERS

The stakeholders have been invited to give input to the project through three channels:

- Interviews (key opinion leaders)
- Workshops
- Web-based survey

Here is a list of some of the stakeholder organizations that have participated in workshops:

Institutt for energiteknikk. (IFE), Akershus Energi Varme AS, Forsvarets Forskningsinstitutt. (FFI) Kjeller Vindteknikk AS, Strømmen Storsenter, Skedsmo Kommune, Etablerertjenesten, Visit Romerike, Nittedal Kommune, Kunnskapsbyen Lill-estrøm, Askim kommune, Askim Sparebank, Indre Østfold regionråd, Moss kommune, Mosseregionen næringsutvikling, Olimb Group, Marker kommune, Eidsberg kommune, Dynatec, Askim Mek Verksted AS, Rygge sivile lufthavn AS, Gjøvikregionen Hadeland Ringerike Reiseliv, Ringerike kommune, Ringerike næringsforum, Rådet for Ringeriksregionen, Statens kartverk, Stiftelsen Kistefos-Museet, Sundvolden Hotel, Tronrud engineering, Treklyngen - Viken Skog, Marcello AS, Follorådet, Ide House of Brands as, Vitenparken, Malthe Winje AS, BPW Follo/Norge - Business and profesional women, Fremtidsmat, Tusenfryd, DesignHub\*Norway, Energi Salg Norge AS, Oppegård Næringsforum, NCE Systems Engineering, FMC Kongsberg Subsea AS, HBV, Kongsberg Gruppen ASA, Sedahl, FMC Technologies, VisitRjukan AS, Kongsberg Cable Systems AS, Notodden Utvikling AS, GKN Aerospace Norway, Nopro AS, KNF, Kongsberg kommune, Høgskolen i Buskerud og Vestfold, Asker næringsråd, Bærum kommune, Oslo Handelskammer, Asker og Bærums Budstikke, Røyken Næringsråd, Semantix, Subsea Valley, Asker kommune, Vestregionen, Asker kommune, AHO, Color Line, Emergence school of leadership, Finans Norge, Høgskolen i Oslo og Akershus, MAD AS, Maipo film, MESH, Multiconsult, Selvaag, Nobelinstituttet, Norsk Film Institutt, Schibsted vekst, Studentparlamentet i Oslo, Urbanagent, Velferdstinget i Oslo og Akershus, Øya festivalen, AS Vidsjå, Advokatforeningen, LPO, SAAHA AS, Munchmuseet, Kon-Tiki Museet, House of Nerds, Maritimt forum, Veidekke, GE Global Growth, SBIO, Konsulent1, SINTEF, Vulkan Arena, Oslo Cancer

Cluster, by:Larm, Nasjonalmuseet, Collaborative Coffee Source AS, Music Norway, Kunsthøgskolen i Oslo, Black Box Teater, dittOslo.no/Nettavisen, Unge Kunstneres Samfund, NINA SKARRA, City of Oslo, Kahoot, Trøbbelskyter, 657, IKT-Norge, Oslo2022, Handelshøyskolen BI, Oslo Jazzfestival, Norwegian Icons, Alliance arkitekter, Aspelin Ramm, Asplan Viak, Avantor Eiendomsforvaltning, Basale, Civitas, Dark Arkitekter, Direktoratet for byggkvalitet, DNB, Eiendomsmægler, Hav eiendom, KLP Eiendom, LINK Arkitektur Team Oslo, NCM Development, OBOS, OSL, OSU, Rom Eiendom, Steen & Strøm, Veidekke, Winta Eiendom, Selvaag Bolig, Stiftelsen Film fra Sør, Oslo Maraton AS, Food Studio, FutureBuilt, Grand Hotel, Kaospilot, ALNA Senter, Aspelin Ramm Eiendom AS, Civitas, Astrup Fearnley Museet, Hotel Continental, Norsk Teknisk Museum, Kulturretaten Oslo kommune, Fashion Footprint, Hjeltnes Consult AS, BLÅ, Technip, OceanHub, DNV GL, Norges Rederiforbund, Maritimt Offshore Forum, Blue-C, HBV, Connect, Shipping & Offshore Network, Norges Var-emesse, SKF, Oslo Metropolitan Area.

In addition to these, several hundred stakeholders have received invitation to participate in workshops.

The purpose of the involvement activities has been two fold. Firstly, it has been to gather information about the assets and narrative of the Oslo Region, as well as information about international target groups and the assumed perception gaps related to the Oslo Region's assets. Secondly, it has been a channel through which to inform stakeholders about the project and encourage their involvement, thus establishing a basis for active participation in future brand management activities. For this reason, involvement activities will also continue after the strategy has been finalised, laying the ground for a gradual transition to implementation.

A total of 23 interviews with key opinion leaders from different sectors have been undertaken. The interviews have been conducted according to a pre-produced interview guide <sup>6</sup> in a semi-structured manner. The minutes from each interview has been published on the project website <sup>7</sup>, after interviewee approval. These are the individuals who have been interviewed:

Nina Solli (NHO og Akershus), Bente Holm, (Visit Oslo), Jon Peder Egenes (Amnesty), Nils Øverås (DNT), Kari T. Jensen (HiOA), Morten Dæhlen (UiO), Torger Reve (Handelshøyskolen BI), Stian Berger Røslund (Oslo kommune), Olav H. Selvaag (Selvaag Gruppen), Preben Strøm (Subsea Valley), Rolv

<sup>5</sup> <http://www.projectosloregion.no/process-2/stakeholderanalyse-2/?lang=en>

<sup>6</sup> <http://www.projectosloregion.no/wp-content/uploads/2014/12/Intervjuguide.pdf>

<sup>7</sup> <http://www.projectosloregion.no/intervjufiler/>



Erik Ryssdal (Schibsted), Torgeir Silseth (Nordic Choice) Thor Gjermund Eriksen (NRK), Rune Bjerke (DNB), Berit Svendsen (Telenor), Per Morten Hoff (IKT Norge), Øyvind Hasaas (Oslo Lufthavn), Hilde Barstad (Kulturetaten Oslo kommune), Knut Olav Åmås (Fritt Ord), Ole Petter Ottersen (UiO), Steinar Mejlander-Larsen (Multiconsult), Kjetil Faldmark Larsen (Selvaag/Lørenskog Vinterpark), Kathrine Myhre (Oslo Medtech).

Fourteen workshops have been organised with 204 participants. The workshops have been organised around discussions that attempt to identify the narrative of Oslo and its performance gaps, as well as how stakeholders are able to help improve the international position of the Oslo Region.

In addition, a web-based survey has been conducted, focusing on how the stakeholders believe their international target groups perceive the Oslo Region on 16 issues within four overarching themes; Business, Liveability, Hospitality, and Governance.

The stakeholders were also invited to a conference with a presentation of **#ProjectOsloRegion** at Oslo City Hall on November 4<sup>th</sup> 2014.

1.5.3. OSLO PERCEPTION SURVEY

To give a sound empirical basis to the strategic choices, actions, and project measurement, we analysed gaps between different kinds of perception of Oslo. Through a survey for both internal and external stakeholders of Oslo, the current perception of Oslo was mapped based on a number of factors that were deemed especially relevant to the Oslo place brand.

The online survey has been distributed through existing networks of #ProjectOsloRegion, Oslo Business Region and Oslo Regional Alliance. The survey was still open at the time of publication, so this document is based on the intermediate results. The data used in this document was extracted from the online survey on 15 January 2015 at 8:00. However, there is no reason to believe that the outcomes at a later stage will vary significantly from the patterns we have currently identified.

The survey asked internal stakeholders about their perception of Oslo and about how they think Oslo is perceived abroad; external stakeholders only received questions about their own perception of Oslo. In the survey, the perception was split into four main categories: 1) business climate, 2) quality of life, 3) hospitality and 4) governance. Each of these four categories was then split in four sub-questions to allow for a higher

level of detail. The survey and the analysis can be found on the webpage of **#ProjectOsloRegion**<sup>8</sup>.

The survey has been constructed in such a way that it can be used for effect measurement, and thus produce longitudinal data on the development of the perception of Oslo. Together with the benchmark analysis described in section 6, this provides a sound empirical basis for measuring the way in which the perception of Oslo evolves.

1.5.4. STUDENT COMPETITION

As part of the project, we also reached out to students in the Oslo Region. We organised a student competition where all students from the Oslo region were invited to participate. The purpose was to get a young perspective on Oslo’s potential in an international context.

The assignment was:

*Create an illustration or vision for the Oslo Region’s position in 2030, and describe a strategy for how the region could take this position. Please see the project from a holistic perspective that includes several types of issues and sector interests. Feel free to use visual and multimedia tools to bring out the main points of the paper.*

There were two contributions in the student competition final, “Competent Co-Creativity” by Ida Skjefstad (Emergence School of Leadership) and Phillip Dixon Sandberg (NMBU), and the winner “OpenCapital:Oslo” by Michael Eriksson (UiO), Thomas Borge (UiO) and Jostein Granås (BI)<sup>9</sup>.

The jury consisted of Acting Vice Mayor Anne Siri Koksrud Bekkelund (City of Oslo), Simen Staalnacke (Moods of Norway), Anita Krohn Traaseth (Innovation Norway), Olav H. Selvaag (Selvaag Gruppen), Martin Boisen (BOISEN - For the Love of Place), Hadia Tajik (Leader of the Judicial Committee, National Parliament)

1.5.5 INTERNATIONAL BENCHMARK ANALYSIS

In order understand the Oslo Region’s performance and perception in relation to international cities, the project asked Business of Cities Ltd to conduct an extensive review based on over 50 international benchmarks and rankings where Oslo appears. The report identified Oslo’s current performance and reputation in 13 of the 16 categories mentioned in section 1.5.3 within the same four themes: business, liveability, hospitality and governance. Oslo’s performance is evaluated according to a 10 point scale.

1.5.6. STUDIES OF OTHER EMPIRICAL SOURCES AND RELEVANT THEORY

In addition, the methodology in this strategy is based on of the analysis of a number of important documents, strategies and reports about the municipalities and counties within the Oslo Region. The strategy also draws on international theory and experience about place brand management.

1.5.7. INPUT FROM ADVISORY BOARD AND LOCAL SUPPORT GROUP

The project has drawn on input and advice from the Advisory Board, which includes several members with extensive experience in the international positioning of cities and regions, brand management and important stakeholders in the Oslo Region. The project has also received input from a Local Support Group with administrative representatives

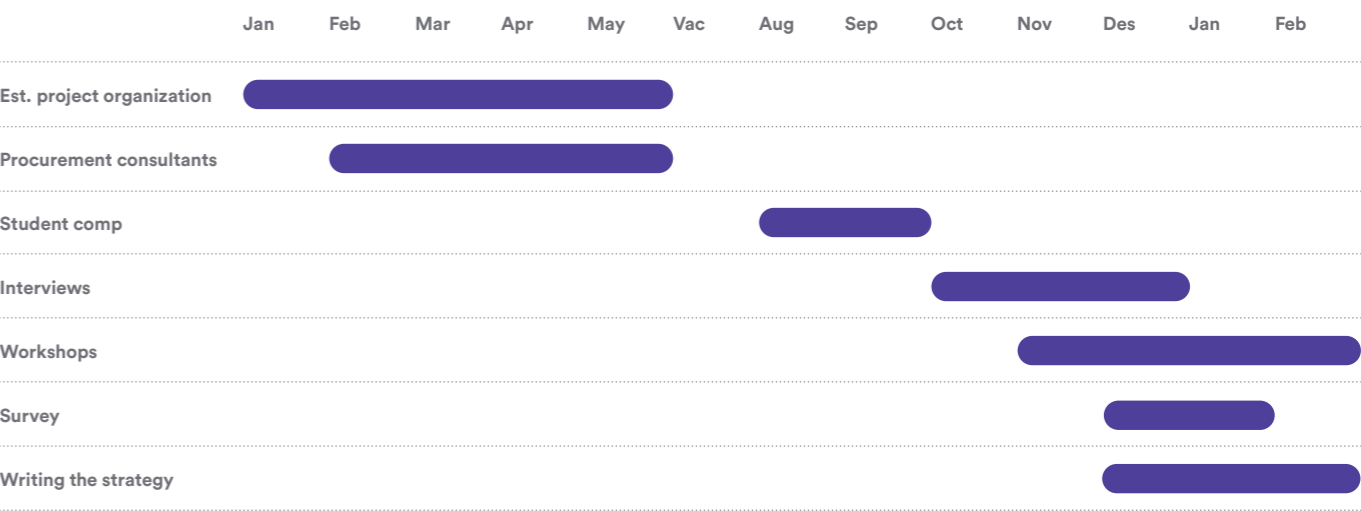
from the City of Oslo, other regions in the Oslo Region as well as cooperating organisations with a stake in the management of the Oslo brand.

1.5.8. PROJECT TIMELINE

The project has been executed in a short space of time. Although some initial preparations were undertaken in 2013, the starting point of **#ProjectOsloRegion** was in January 2014.

The first half of 2014 focused on building the project organisation and the procurement of consultants. After summer vacations, the student competition and the other involvement activities were launched. The final phase of the project has focused on writing the strategy, as well as continued involvement activities.

Table 1: Project timeline ProjectOsloRegion



<sup>8</sup> See [http://www.projectosloregion.no/wp-content/uploads/2015/02/Inside-Out-Analysis-FINAL\\_DRAFT\\_SINGLEPAGE.pdf](http://www.projectosloregion.no/wp-content/uploads/2015/02/Inside-Out-Analysis-FINAL_DRAFT_SINGLEPAGE.pdf)  
<sup>9</sup> See both contributions at <http://www.projectosloregion.no/involving/student-konkurranse/>

# 2. What is Place Brand Management? The theory

## 2.1. Introduction

In the last four decades, the world has seen an ever-growing number of cities and regions applying the concepts and techniques of businesses to places. David Harvey described this as a “shift from managerialism to entrepreneurialism in urban governance” (Harvey, 1989). At the same time, the position of cities within their national contexts has shifted along with the changing role of the national states themselves (Brenner, 2004). How we govern, plan and manage our cities needs to constantly change in order to create better places to live and work in the future.

Cities see both opportunities and threats in globalisation, as well as in their own shifting position within national and global competitive fields. As one of the consequences of these developments, “place branding is becoming increasingly important for cities, regions and countries, both to secure a position in the competitive global economy, and to inspire and instigate local pride and attachment. Having the right place branding strategies, tools and methods is vital to gain success in the marketing and branding of a place” (Phønix - The International Place Branding Panel, 2015).

This has led to an increasing perception of competition between cities outside of their national contexts and hierarchies. This state of competition became the imperative to launch strategic programmes to strengthen the competitiveness of a city and its region, and thus attract investments, businesses, mega-events, institutions, tourists, citizens and other market segments of an increasingly mobile and global world (Boisen, 2011).

Post-industrial cities, post-colonial cities, post-soviet cities, former beach resorts that have lost visitors, and so on have launched strategic programmes with the purpose of strengthening their competitiveness by promoting themselves to a global audience.

Although the terminology of marketing and branding were used in many cases, the theoretical frameworks and practical methods often were not. The strategic

choices made to enhance a city’s competitiveness by improving its assets (business environment, infrastructure, cultural scene, quality of life, etc.) were frequently detached from the enhancement of a city’s image and reputation. This resulted in place marketing and place branding becoming synonymous with promotional efforts. The promotional efforts stated facts and showcased events, new buildings etc., but a strategic coordination between the desired image of the city and the actions to improve the city was often lacking. Therefore in public opinion, place marketing and place branding is often seen as being primarily about logos, slogans and campaigns. This is a very limited view that doesn’t do justice to the potential benefits and strategic advantages that a mature approach to the marketing and branding of cities and regions provides.

## 2.2. Contemporary place brand management

Although still evident, the aforementioned gap between theory and practice is closing fast. The scientific community, the consultant scene and the public sector have produced a lot of progress in the last decades, re-thinking what marketing and branding would mean when the concepts and their toolboxes are translated to cities and regions. The purpose of this section is not to give a thorough analysis of the latest academic discoveries, but to make a few important distinctions that have helped guide Oslo in the formulation of its place brand strategy. At the same time, however, this section does summarise the emerging consensus on what place branding *could* - or even *should* - be when we look at theories instead of the actual policies and strategies that cities carry out when they undertake place marketing and/or place branding.

First of all, some important distinctions: Whereas *place marketing* focuses on balancing out the supply of products and services in a given place with the demand for these products and services amongst internal and/or external target groups, place branding focus on improving the image and reputation of the

place itself. A *place marketing strategy* can be deemed successful when the actual choices and behaviours of pre-defined target groups are influenced in a way that is positive for the place in question. A place branding strategy can be deemed successful when positive associations with core values of the place are strengthened in the mind of these pre-defined target groups. The goal is to improve the general perception of the place, in the belief that this will help securing a favourable position in the minds of consumers and decision-makers.

It’s not a choice between *place marketing* and *place branding*; it’s about identifying and streamlining how these two disciplines interact. Any given place will have organisations concentrating on *place marketing activities*, but not all will be able to organize a

strategic place brand management. This is because **the challenge is to create a place brand platform that act as a filter, emphasizing messages, images, propositions and investments that are on-brand (in line with the core values), while ignoring or actively moderating such elements that might be off-brand (not in line with the core values).**

Today, the state-of-the-art theory on place brand management acknowledges the fact that the place itself is the brand. Just like commercial brands, places contain meanings and signify a specific set of associations and values in the minds of people. And just like commercial brands, people identify with places both emotionally and rationally. In this sense, **it is the place itself (signified by its name), which is the brand, not a logo or a visual identity.**

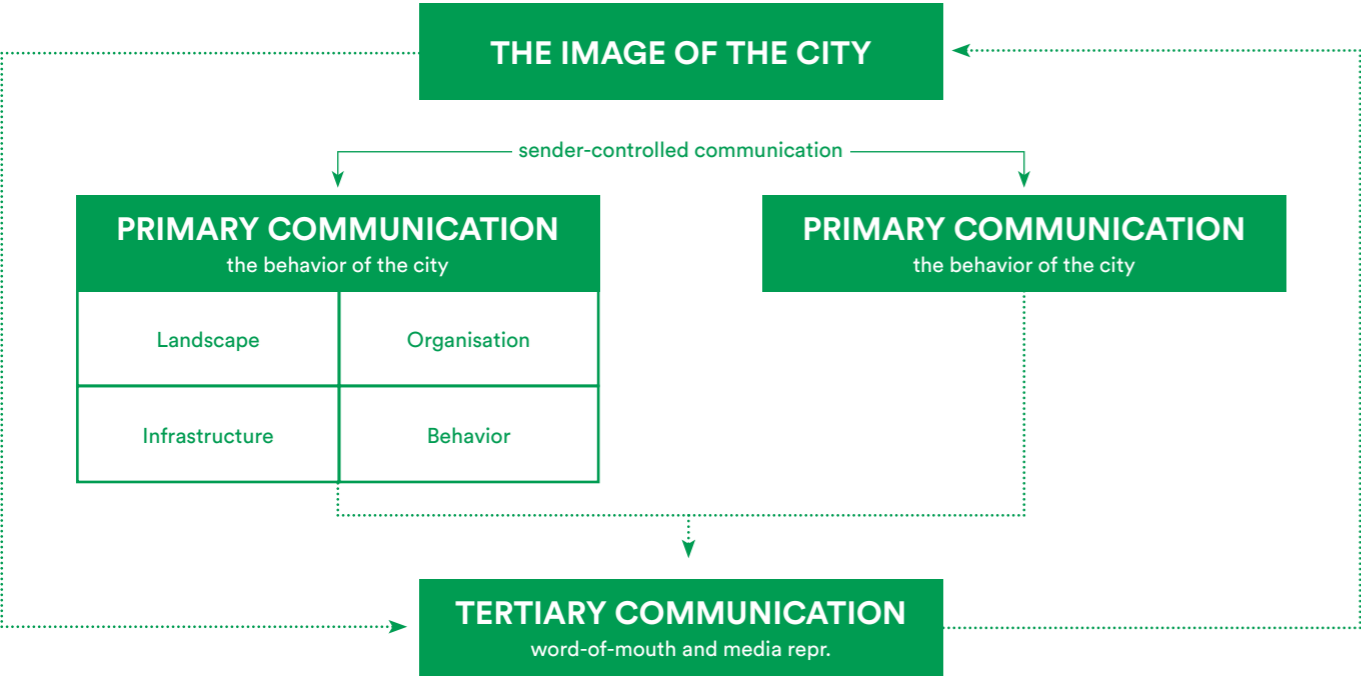
Figure 2: Place Brand Strategy scope



Realizing that a place brand strategy needs to be managed to influence key decisions makers and add value to the sectorial marketing efforts of the place is an important step. In the figure above, the three main sectors for place marketing are illustrated in combination with the place brand strategy. This shows that, for example, when developing and promoting the business climate in one place, it cannot be detached from the general quality of life that the employees will experience; these sectors are intrinsically connected.

The place brand strategy forms the core values and the core promise of the place in question, which all product- and service-development, promotional messages, propositions and experiences should reflect. The perception of the place amongst key decision makers, opinion leaders, expats, tourists and citizens should match their actual experiences. The ambition for a place brand strategy must be to improve both perception and reality. The only way to do so is to create a way in which all the various efforts of the city are managed perception-wise: place brand management.

Figure 3: Brand communication



There are an enormous number of entities and actors that consciously or not influence the brand of a place. According to the framework of the leading place brand scholar, Mihalis Kavaratzis (2004), one might even conclude that everything that happens in or around a place influences its brand. The purpose of place branding is therefore not one of creating a brand because it is already there. Instead, it is one of shaping or moulding the existing brand. Obviously, this requires that the place brand management has some influence in the activities of key organisations and institutions that are responsible for the place’s primary, secondary and tertiary communication. Contemporary insights in relation to place branding therefore emphasise that place brand management should play an integral role in urban and regional governance.

2.3. Lessons Oslo has learned from other cities and regions

It is important to bear in mind that most examples of cities and regions indulging in place marketing and place branding activities have not been able to imple-

ment these concepts to the same extent as traditional businesses. This might not be a bad thing, but the expectations have not been adjusted in accordance to the amount of resources invested and the responsibilities granted to such organisations. Therefore, most initiatives have struggled to reach the expectations of their stakeholders.

As a result, there are no best practices, because no single place does everything right. Moreover, what has been successful is often place-specific, meaning that the same processes cannot easily be replicated in the Oslo context. However, a lot of lessons can be learnt from other cities and regions. In the following, we briefly present some of the most important and relevant lessons for Oslo. The examples are partly drawn from our participation in the Urbact CityLogo project<sup>10</sup>, and partly shared with us by the international members of our Advisory Board.

2.3.1. LESSON 1: THE CORE CITY IS THE MOST RELEVANT BRAND FOR AN INTERNATIONAL AUDIENCE

Structural political tensions between large cities and both their regions and countries are a familiar issue. This is particularly the case in countries that are dominated by a single city, such as in the United

Kingdom, Denmark, Sweden and Norway. Even in countries like Germany, it has been hard to organize a region around a large core city.

The tensions between the countryside and the central city are both cultural and political. However, learning from other cities we can clearly see that it is possible to overcome these differences for the common good. The key is to introduce an international lens to the discussion, and to acknowledge that the brand that matters to potential international target-groups is the brand of the most relevance and importance.

Example: Amsterdam

Amongst many other activities, Amsterdam Marketing carries out a program co-sponsored by 2 provinces and 36 municipalities in the Amsterdam Metropolitan Region. In this program coordinated by Visit Amsterdam and See Holland, the whole region is presented to international tourists as one destination: Amsterdam. The project doesn’t limit itself to promotional activities, but embodies product development and infrastructure. The program is hugely successful in distributing the benefits of tourism over a larger geographical area than the inner city of Amsterdam itself. Another program, Amsterdam in Business lets other municipalities in the region present themselves as Amsterdam when abroad, thereby both enhancing their relevance to international actors and increasing the exposure of Amsterdam. The key logic for both programs is that if it is good for Amsterdam, it is good for the region, and vice versa. Both programs use Amsterdam as the main brand internationally, while keeping the identity of the individual entity intact within a national context.

2.3.2. LESSON 2: STAKEHOLDERS PREFER PROJECT-WISE INVOLVEMENT

Although acknowledging that place branding requires long-term strategic planning, many stakeholders are more inclined to contribute in terms of resources and funds when working on a project-by-project basis. Back-office costs, overheads and reformulation of long-term strategies are seen as less desirable by investors. In general, they prefer to sponsor selective events or those with clear ambitions, goals, deadlines and budgets. Knowing this, successful place brand management can accommodate for it. This points to the creation of a structural base financing of back-office, organisational activities and long-term strategic investments with a larger share of public than private funds, while at the same time stimulating on-brand projects primarily funded and led by a coalition of stakeholders.

Example: Barcelona

Barcelona Global<sup>11</sup> is a private not-for-profit members association aiming to make Barcelona one of the best cities in the world in order to attract talent and develop economic activity.

Its members are some of the major organisations in Barcelona, including research centres, businesses, business schools, universities, entrepreneurs, and professionals. In December 2014, Barcelona Global had 28 protector members, 46 basic corporate members, and 321 professionals.

Actively working since May 2012, the organisation’s major claim is “let’s make it happen” and is focused on several projects regarding the Barcelona Brand (positioning Barcelona as a investment destination and not only a tourist destination), the city’s international friendliness (opening the city and connecting Barcelonians by birth with Barcelonians by choice), business friendliness and accelerating economic opportunities.

Among its projects, Barcelona Global has created a network of more than 60 members that work and live outside Spain. This Barcelona Global International Council network aims to identify opportunities for Barcelona, act as brand ambassadors and prepare agendas for its Global members and public officials when going abroad.

Barcelona Global has not had any financial ties with the City Council and stresses its independence. It has received the recognition of the City Mayor by a MOU for its special role in helping Barcelona to promote its brand.

2.3.3. LESSON 3: DO IT RIGHT THE FIRST TIME, FORESEE AND ACCOMMODATE CHANGE

Many cities are re-shaping their organisations and/or re-phrasing their strategies. This is an inevitable result of the growing interest in place brand management, but it means it is increasingly difficult to engage, motivate and include stakeholders. Therefore, it is of the utmost importance that the organisational aspects and the overall strategic framework are implemented well first time around. This means that it should accommodate political, organisational and strategic evolution over time, without necessarily resulting in drastic changes. The politics should maintain influence, but not control. Just as politicians can keep private stakeholders focused on a long-term strategy, so should private stakeholders be in a po-

<sup>10</sup> <http://urbact.eu/citylogo>  
<sup>11</sup> See [www.barcelonaglobal.org](http://www.barcelonaglobal.org)

sition to keep politicians from taking control of the place brand management itself.

**Example: Utrecht**

Being the lead partner in the Urbact CityLogo project, the City of Utrecht, has stressed that laying the appropriate project foundation is one of the largest challenges, as its organisational set-up has changed three times in recent years. In the first organisational set-up, stakeholders were generally willing to engage and invested time and resources into the building of the strategy organisation. Subsequently, support has been significantly lower, and has been replaced by cynicism and direct opposition when expectations and promises are not being met. Many stakeholders have since detached themselves and lost belief.

**2.3.4. LESSON 4: NO SIZE FITS ALL**

In terms of organizing and financing place brand management, every place has its own culture of doing things. It might be necessary to build a new organisation in one place, give the responsibility with an existing organisation in another place, or share this responsibility in a third place. The same goes for financing. Some places aspire to a 50:50 share of costs between public and private stakeholders, whereas other places see place branding as a purely governmental expenditure. This also means that there is no organisational or financial model that suits all places, even for places that appear to be reasonably similar; our neighbours in Stockholm and Copenhagen are a testament to this.

**Example: Copenhagen and Stockholm**

Stockholm has created a brand partnership programme with public financing based on the number of residents per municipality. Due to the momentous support for the Stockholm brand programme ‘Stockholm - Capital of Scandinavia’, the regional financing scheme has grown, thereby making more resources available and increasing the number of public and private stakeholders committing themselves to the strategy.

It is unlikely that this approach would work in Copenhagen, where it has two different professional organisations for business marketing and tourism marketing: Wonderful Copenhagen and Copenhagen Capacity. The attempt to create an umbrella place brand (Open Copenhagen) above both Wonderful Copenhagen and Copenhagen Capacity has been cancelled after five years due to the failure to gain enough support. However, this does not mean that Oslo cannot learn from both. Accommodating



existing professional and sectorial organisations already engaged in place marketing through a place brand management that facilitates such organisations instead of simply replacing them might be the most viable solution in Oslo. To pay for back-office facilities and overhead, the structure of public finance might well be modelled on the Stockholm example.

**2.3.5. LESSON 5: KEEP THE MOMENTUM GOING**

After a strategy has been formulated, long-term goals set and stakeholders engaged, many place branding projects grind to a halt while waiting for organisations to be built, financing to be settled and narratives to be developed. As a result, projects often fail to reap the benefits of the momentum that has been built along the process. Therefore, it is an important lesson to directly start with concrete initiatives. During the analysis, formulation of strategy and stakeholder-involvement, it is essential that a certain number of easy targets are focused on in order to boost enthusiasm and help drive civil, political and private support for further development.

**Example: Dundee and Utrecht**

CityLogo-partners Dundee and Utrecht has both shown how to stimulate and carry out quick wins to gain support while stakeholder attention and expectations are high. Dundee is following this strategy to realise a lot of projects with relatively modest budgets, while Utrecht produced a ‘to-do list’ with 20 initiatives on which stakeholders could sign in and start working on immediately.

**2.3.6. STRATEGIC DECISIONS**

For Oslo, the five lessons in the above, combined with the insights into contemporary place brand management, have contributed to several strategic decisions (also mentioned in part 1):

- I. We are not going to build an organisation for Oslo’s brand management in the next couple of years. Oslo wants to adopt the team approach, building up and combining local expertise. A joint venture between Visit Oslo, Oslo Business Region and Oslo Regional Alliance should take a coordinated lead in a place brand management framework that includes a large number of public and private stakeholders organised in a ‘coalition of the willing’, from which we will ask for active participation in both strategy and action.
- II. We will aim to produce a place brand management that removes any differentiation between Oslo and the region in an international context; Oslo is both the city and the region.

- III. We will not wait for political approval before engaging in activities that the mandates of current organisations already contain.

Therefore, we will start a joint venture between Visit Oslo, Oslo Business Region and Oslo Regional Alliance to establish the place brand management, and further facilitate initiatives and stakeholder participation. We will also make sure that the modus operandi of the place brand management is flexible and allows for continuous evolution of organisation, financing and actions, as long as the core values of Oslo remain.

**2.4.What’s in it for whom?**

The last part of this section on place brand management is about two critical issues that are intertwined with this discipline. The first issue is ‘what’s in it for me?’ The second issue is that of success criteria and measurement. Obviously, these two issues have a lot to do with each other. In this document, it is important for us that it is made clear to the stakeholder (be it a private company, a municipality or a citizen) which activities are carried out as a part of the place brand management project, and why these activities are deemed favourable for Oslo as a whole. As well as maximizing transparency and accountability, it is necessary to communicate the vision that the region is a functional geographical entity in which administrative or sectorial borders are not determining economic and social futures. In other words, everything that benefits Oslo benefits the region and vice versa. More tourists in the city centre generate jobs that are filled by people living outside the city centre. More companies in the region provide jobs for everybody within a one hour commute, and the growing population drives both traditional real estate and leisure facilities to reach a higher level.

The division between the place marketing organisations and the place brand management should also be reflected in the success criteria. For example, existing success criteria guide the efforts made by Visit Oslo. These success criteria should not be transferred to the place brand management, but remain with the organisations in a position to cater to the relevant markets. The type of success criteria needed for place brand management are centred on perception, not on actual behaviour. Therefore, we will formulate success criteria that can be measured on a continuous basis without overlapping with the existing success criteria of the established sectorial, promotional agencies.

# 3. The context and rationale for an international place brand strategy

## 3.1. Historical background, Oslo and the Oslo Region

The regional area defining the Oslo Region today has a long history as one of the most dynamic and populous areas in Scandinavia, reaching back to the Middle Ages.

Oslo is the oldest city of the present Scandinavian capitals. The first archaeological evidence of urban settlements in Oslo dates back to before 1000 A.D. Oslo has been regarded as the capital city since the reign of King Haakon V (1299–1319), the first king to reside permanently in the city. The oldest city in the region is Tønsberg, believed to have been established in 871 A.D.

The central part of the Oslo Region, around the Oslo Fjord, was referred to as ‘Viken’ during the Viking ages, and some believe that the name Vikings related to the name of this area<sup>12</sup>.

Following the Black Death during the mid-14<sup>th</sup> century, the number of inhabitants was reduced by as much as 60% in Norway and what is now called the Oslo Region. Governance was largely taken over by Danish kings. Following the Napoleonic war, in 1814 Norway entered into a union with Sweden, and gained full independence in 1905.

Maritime professions, along with agriculture and forestry have long traditions in the region. During the 19<sup>th</sup> century, the region became the industrial centre of Norway. In the first half of the 20<sup>th</sup> century, this development continued, with many small mechanical industries and large shipyards.

With the Norwegian oil age from the 1970s, the City of Oslo gradually developed into a city dominated by

service industries and trade. More traditional industry in the surrounding region became increasingly specialised and technology driven, with a shift from mass production to the development of prototypes and specialized equipment. At the same time, the development of the welfare state gradually increased the importance of national government institutions in the capital.

The maritime industries have been important in connecting Norway to other parts of the world, with Oslo being a centre for one of the world’s largest merchant navies. Following the Second World War, influential Norwegians – many of them from Oslo - have also been active in international organisations such as the UN and NATO.

Norway has always been a key point on the route northwards. The first settlers there were pioneers who worked the land and harvested the seas. The Vikings visited and explored faraway places. The sailors on ships from the Oslo Region went whale hunting in arctic waters and transported goods to and from all corners of the world. The Oslo Region was the starting point for the first expeditions to both poles, and the homeplace as pioneers as Fridtjof Nansen, Roald Amundsen and Thor Heyerdahl, and many more who have since followed in their footsteps.

Oslo’s history demonstrates that it has always been an ‘outward looking’ city. On the other hand, Oslo has remained a relatively anonymous city on the world stage, with a small population and fewer international visitors per capita than many other European capitals. During the 1960s and 1970s, the first migrant workers from outside Europe came to the region. During the last 30 years, there has been a great increase in the number of immigrants from both inside and outside of Europe, and this is one of

the driving forces behind the population growth, the change in demographic mix and the altering aspirations of this period.

## 3.2. Recent changes in demographic, economic, spatial and cultural characteristics and outlook

### 3.2.1. POPULATION GROWTH AND INCREASED REGIONAL INTEGRATION

Transportøkonomisk institutt (TØI) and Norsk Institutt for By og Regionforskning (NIBR) have recently conducted a study on behalf of the Oslo Region Alliance looking at major demographic, economic and spatial trends in the Oslo Region over the past 10 years (Nore et al, 2014).

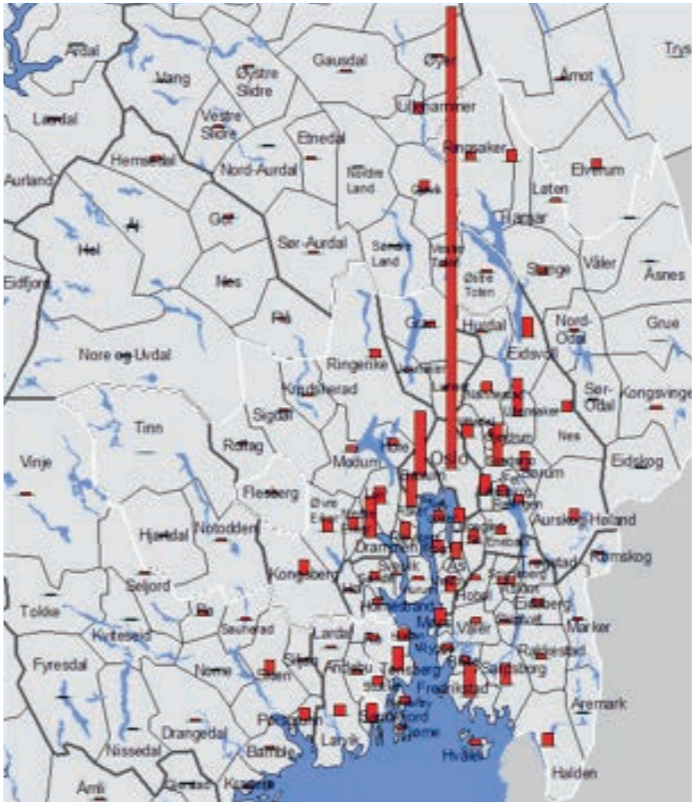
Population growth in the region has been 15% in the period of 2004-2014, higher than the national growth rate of 12%. There are, however, major differences within various parts of the Oslo Region. The City of Oslo has had a 22% population growth in this period. The largest relative growth has been in a belt of municipalities in the middle part of the commuter-area that surrounds Oslo; Ullensaker grew by 36%, while Sørum, Hole and Gjerdrum all had a relative growth of 33%.

Figure 4: Population growth in municipalities in the Oslo Region 2004 – 2014, real numbers. Source: TØI/NIBR

The population in the region is relatively young, with a rapid growth rate for 25-35 year olds. In Oslo and many of the surrounding municipalities, this group is predicated to grow by more than 30% over the next ten years, increasing the supply of labour and the demand for housing.

The population in the region is well educated. The proportion of the employed population with a higher education qualification has increased nationally from 23% to 30% in the period 2004-2014; Oslo has witnessed a growth from 38% to 48% in the same period. In addition, other cities in the region, such as Kongsberg, Hamar and Tønsberg have had growth that is more rapid than the national average.

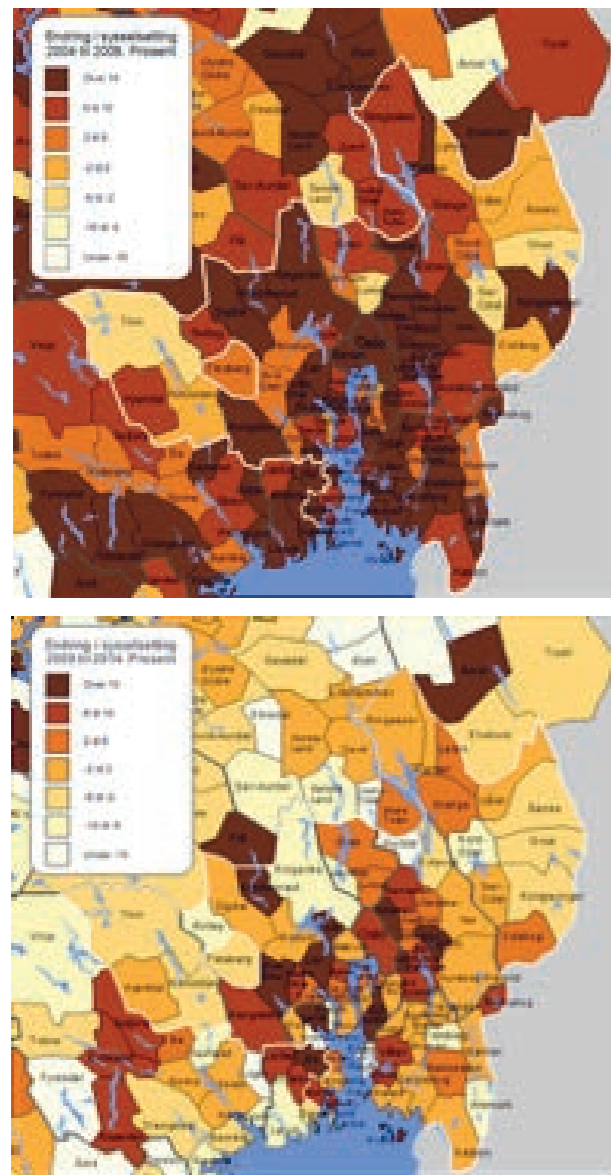
There are several indicators pointing towards a more integrated region, with integrated labour markets, housing markets and markets for amusement, culture and leisure. The data reveals (Nore et al, 2014: 132pp) an increase in the frequency of commuter travels from the rest of the region to and from Oslo, with the largest increase in jobs within the city of Oslo in absolute numbers. However, there are also indications that other cities are strengthening their position within the region as a place to live and work, exemplified by Kongsberg and Hamar. Oslo has seen the number of jobs grow by 18% since 2004. However, the relative growth in the number of jobs has been greatest in the municipalities that surround Oslo: Nannestad 39%, Ullensaker 29%, Skedsmo and Kongsberg 27%, Ski 24% and Drammen at 23% (Nore et al, 2014: 42pp).



Befolkningsvekst  
2004 til 2014  
Absolutte tall

<sup>12</sup> <http://no.wikipedia.org/wiki/Viken>

Figure 5: Relative change in number of employees 2004-2009 and 2009-2014. Source: TØI/NIBR



The statistics about land use point to a growth in urban housing, with an increase in the proportion of flats and a greater use of public transport. This growth is most visible in Oslo and the municipalities closest to Oslo.

In the coming years, there will be major improvements in both the railway and highway infrastructure in the region. The national government has adopted a plan to build an improved rail system in the Oslo area, with increased capacity for both passengers and goods. The InterCity Triangle will improve connections and reduce travel time towards Lillehammer, Skien and Halden. The first phase of

the project will be finished by 2024, and the second phase by 2030. This is expected to result in further regional integration within the labour and housing markets. There are also ongoing efforts to improve the capacity for Oslo Airport and the terminals for goods.

However, there are also major bottlenecks remaining. The need for better capacity railways and subways through Oslo will remain a major political challenge in the coming years. A new crossing of the Oslo fjord may increase the capacity in the transport infrastructure south of Oslo, if funds are allocated to this project. There are also proposals for a high-speed train connection that would link Oslo to Gothenburg and Copenhagen<sup>14</sup>. Funding, however, is still uncertain for this project.

During the last 10-15 years, major projects in the city's design and architecture have spread to the region. Drammen and Lillestrøm are examples of cities that have undergone important changes. A common factor is the focus on urbanisation, with emphasis on multi-functional spaces and modern architecture. The most prominent example of this, however, is Oslo, which has undergone one of Europe's most extensive waterfront transformations. Mechanical industry, roads, railroads and harbour activity have given way to public access to the waterfront, accompanied by large architectural landmarks such as the Barcode and Tjuvholmen. The new opera house, designed by Snøhetta, and the Astrup Fearnly Museum for contemporary art, highlight these areas as places for amusement, as well as places to work and live. The new Munch Museum, the National Museum, and a state of the art city library are also under construction.

At the same time, older districts in Oslo have been given new life, with cafés, shops, restaurants, bars and more – regeneration has been a major trend. Many of these districts in the central and eastern part of the city centre have become especially popular among Oslo's young population.

### 3.2.2. CHANGES IN CULTURAL CHARACTERISTICS

Several trends have influenced the change in culture in the Oslo Region over the past decades. The demographic changes, with a growing number of immigrants from both European countries and further afield, have contributed to a more open and creative atmosphere, with impulses from a broader and more heterogeneous undercurrent.

The number of young and highly educated people

have helped to challenge established norms and created a thirst for innovation. Not surprisingly, Norwegians are early adapters of new technology<sup>15</sup>. The region's relative affluence and high level of employment, has also given the population the possibility to spend more time on travel, leisure and culture.

While adapting to new trends, the population in the region has retained many of the traditional Norwegian values, particularly openness, accountability, equality and informal and non-hierarchical structures. Family values are held in high esteem, with a strong interest in matters concerning paternal leave, day care, schools and family outings. The combination of a large number of highly skilled jobs, a large young population, new technology and traditional values has highlighted the importance of the balance between work and life outside of work.

The 2011 attacks were two sequential lone wolf terrorist attacks against the government, the civilian population, and a Workers' Youth League (AUF)-run summer camp in the Oslo region on the 22<sup>nd</sup> July 2011, claiming a total of 77 lives and making a significant impact on the people of Oslo and Norway in general. The attack challenged beliefs that Oslo and the Oslo Region were safe places where terror on this scale could not occur. At the same time, the experience helped forge a stronger sense of community. Several websites and Facebook groups that focused on Oslo as a shared community appeared. The slogan "Oslove" became a popular hashtag in the immediate aftermath, and stayed on as a label attached to positive elements in the city, be it acts of kindness, pictures of architecture or nature. The general interest in Oslo, and Oslo's place in the world, rose in the years that followed. This might also have given energy to new ambitions about Oslo on the international stage.

### 3.2.3. CHALLENGES FOR GOOD REGIONAL GOVERNANCE

Because of Oslo's population growth, the need for holistic planning for spatial development and transport infrastructure, as well as improving the region's international competitiveness, has risen to prominence, with several reports and white papers pointing to the challenges faced by Oslo's governance<sup>16</sup>.

In 2004, the Oslo Region Alliance was established. One of the motivations behind the initiative was to

create an arena for municipalities and counties to coordinate their strategies on these issues. In 2008 the 57 municipalities and two counties who were members of the alliance<sup>17</sup>, adopted a joint strategy for spatial development and transportation with a vision for a polycentric development of the Oslo Region. This was both a basis for better internal coordination of plans in the region, and for a clearer articulation of the region's expectations of the national government. The Oslo Region Alliance is currently in a process of revising its joint strategy for spatial development and transportation.

In March 2012, city councils of Oslo and Akershus agreed to develop a joint plan for spatial development and transport in Oslo and Akershus<sup>18</sup>. The joint plan, which is based on the recommendations in the Oslo Region Alliance strategy, will provide guidelines for the municipalities' planning<sup>19</sup>. It will argue for more concentrated growth in and around existing cities, thus making it feasible to increase the use of public transport, reduce emissions and preserve green fields and agricultural land. Similar initiatives have also been launched by Buskerud and Østfold Counties.

After the national elections in 2013, the new majority in parliament agreed to introduce reforms in the governing structure at municipal and regional level. Their aim is to produce a significant reduction in the number of municipalities through mergers, as well as reform of the existing counties. In the Oslo Region, several municipalities are discussing proposals for merging with one or more of their neighbours. Parliament will make a decision about the governmental structure on local and regional level by the end of 2017<sup>20</sup>.

### 3.2.4. BUSINESS STRUCTURE IN THE OSLO REGION

The Oslo Region represents approximately 50% of the value creation in Norway and approximately 50% of employment, with about 40% of the Norwegian population.

Measured in value creation, the building sector (production and services related to the building sector such as architecture, consulting and property) and the finance sector (finance, insurance) are the two biggest sectors in the Oslo Region (Menon Business Economics, 2014)<sup>21</sup>, followed by retail. All sectors except traditional maritime industries (ownership and

<sup>14</sup> See <http://www.8millioncity.com/>  
<sup>15</sup> <http://e24.no/kommentarer/spaltister/evry-sjefen-nordmenn-er-digitalpioneret/23248969>

<sup>16</sup> [https://www.regjeringen.no/globalassets/upload/krd/vedlegg/rega/rapporter/r4881\\_styringsutfordringer.pdf](https://www.regjeringen.no/globalassets/upload/krd/vedlegg/rega/rapporter/r4881_styringsutfordringer.pdf)  
<https://www.regjeringen.no/nb/dokumenter/stmeld-nr-31-2002-2003-/id402979/>  
<https://www.regjeringen.no/nb/dokumenter/stmeld-nr-31-2006-2007-/id469140/>  
<sup>17</sup> The Oslo Region Alliance has since grown, and currently consists of 78 municipalities (including Oslo) and four counties.  
<sup>18</sup> See <http://plansamarbeidet.no/>  
<sup>19</sup> In Norway, the municipalities have the main responsibility for zoning and spatial planning.  
<sup>20</sup> <https://www.regjeringen.no/nb/tema/kommuner-og-regioner/kommunereform/id751048/>

services for ships and floating vessels), have experienced growth in the period from 2004-2012 <sup>22</sup>. The largest relative growth has been in the offshore and oil industries.

According to Menon Business Economics, value creation has grown by 66% in the Oslo Region in the period from 2000-2011, which represents an annual growth rate of 1.79%. This is both less than the other major cities in Norway and the national average. The overall value creation per capita is, however, still higher in the Oslo Region than any of the other region in Norway.

Oslo is considered one of the world’s most important hubs for maritime industries <sup>23</sup>. Within subsea technology, industries in the Oslo region represent more than 50% global market share in several segments <sup>24</sup>.

In a national context, the Oslo Region stands out as a centre for finance and IT services. Another important sector is knowledge-based services <sup>25</sup>.

According to Clark & Moonen (2015: 3), Oslo’s economy far outperforms its size. Oslo’s gross value-added (GVA) has grown by over two-thirds in the past two decades, which represents above average performance among successful medium-sized European cities. The city has been especially successful at creating jobs (+32%) and diversifying its economic base in that time, with only Helsinki in Scandinavia recording a faster job growth rate (see table 2).

Table 2: Economic performance since 1995 among 10 liveable cities in Europe. Source: LSE MetroMonitor

Value added		Jobs	
City	GVA Growth	City	Employment growth
Stockholm	102%	Helsinki	34%
Helsinki	82%	Oslo	32%
Gothenburg	77%	Zurich	31%
Oslo	68%	Geneva	29%
Edinburgh	65%	Stockholm	26%
Copenhagen-Malmö	48%	Barcelona	24%
Zurich	47%	Edinburgh	23%
Vienna-Bratislava	46%	Gothenburg	20%
Geneva	45%	Vienna-Bratislava	19%
Barcelona	38%	Copenhagen-Malmö	14%

Barcelona

<sup>21</sup> It should be noted that Menon Business Economics has chosen a different and more limited definition of the Oslo Region than is otherwise used in this document. Menon's definition includes Oslo, all municipalities in Akershus County, Lunner and Gran in Oppland County, Spydeberg and Hobøl in Østfold county and Whole, Lier and Drammen in Buskerud County.

<sup>22</sup> See <http://menon.no/upload/2014/12/10/verdiskapingsvekst-i-storbyregionene.pdf>

<sup>23</sup> <https://www.messe.no/Global/NV/OsloMaritimeWeek/pdf/one%20of%20five.pdf?ExhibitionId=0>

<sup>24</sup> [http://www.drammen.no/nb-NO/Magasinteknologi-og-utdanning/Subsea\\_valley.aspx](http://www.drammen.no/nb-NO/Magasinteknologi-og-utdanning/Subsea_valley.aspx)

<sup>25</sup> [http://www.osloregionen.no/wp-content/uploads/proj\\_2013-06-14\\_kunnskapsgrunnlaget.pdf](http://www.osloregionen.no/wp-content/uploads/proj_2013-06-14_kunnskapsgrunnlaget.pdf)

As in most western economies, the business structure in Norway, and particularly the Oslo Region, has undergone major structural changes in the last decades. Networks and clusters are increasingly important as the large companies with all functions in-house have become rare, and a more heterogenic system of manufacturers, suppliers, and specialised services is increasingly the norm.

The national policies for business development has recently emphasised clusters as a more important part of their strategy, with the Arena Program, as well as programs for National Centres of expertise (NCE) and Global Centres of Expertise (GCE). Although the Oslo Region currently has only four NCEs <sup>26</sup> and no GCEs, business networks - some with cluster ambitions - are growing in numbers. Oxford Research, on behalf of the Oslo Region Alliance, has identified 71 networks and clusters in the Oslo Region <sup>27</sup>. With these regional networks and clusters, the importance of place becomes even more prominent.

As the most diversified economy in Norway the start-up ecosystem in the Oslo region plays a particularly important role in it's the future economic development. The start-up scene in Oslo is known to lag 2-3 years behind the ones of Stockholm and Helsinki, but is steadily catching up. Over the last couple of years a wide set of entrepreneurial networks and institutions, based on extensive international cooperation and networks have been established in Oslo. Institutions and incubators such as MESH, Startuplab, Sentralen, 657, Kjeller Innovation, Simula Innovation, Oslo International Hub and others, have established themselves as hubs for a growing number of new start-ups with international aspirations. In addition, more specific fields such as medical-tech, educational-tech, financial-tech, gaming and other technology and ICT driven developments have been established as highly professional networks and communities for international entrepreneurs.

Whereas national programs for start-ups and business development previously failed to create effective policy instruments for Oslo due to a focus on the rural areas of Norway, there is now a big shift in policy, with more emphasis on cities as engines for innovation. The effect of this shift is expected to increase over the coming years, giving Oslo not only a national, but also an international, position as a pioneering hub for entrepreneurship.

The travel industry is an important part of the business sector in the Oslo Region. National strategies for travel are mostly focused on 'mountains and fjords', and less on the capital region. Nonetheless, Oslo is the most visited city in Oslo for tourists, with several prominent and world renowned attractions.

Oslo's attractiveness as a tourist destination is steadily improving. The transformations in the city center, the cultural offerings and the music scene are some of the assets that contribute to this. While much of Norway is marketing fjords and mountains, the urban and cultural qualities within beautiful surroundings have a great appeal for an international audience and the international media. In particular, there is a special interest in architecture, the Fjord City and the new Munch Museum.

Oslo is now one of the 20 most attractive cities in the world (ranked 16th in 2013) for international conventions. This reflects the active professional and research-based community, which is increasingly aware of the benefits of choosing Oslo as venue for their most important meetings.

In 2012, the travel industry in Oslo represented 23% (13 billion NOK) of all value creation in the Norwegian travel industry and employed 25,000 people.

The overall growth in tourism was 7% in Oslo in 2014, compared to 3% for Norway. The hotels in Oslo had more than 4 million guest nights in 2014, which is an increase of 260,000, or 6.8%, compared to 2013. The travel industry in Oslo is therefore different from the travel industry in the rest of Norway, with a higher value creation per employee, higher wages and higher productivity.

3.2.5. RESEARCH AND HIGHER EDUCATION

The Oslo Region has 37 universities, colleges and other institutions that offer government approved education programs at a higher education level. There are approximately 100,000 students in higher education in the Oslo Region. The most prominent higher education institutions in the region are the University of Oslo, The Norwegian University for Life Sciences (NMBU) and the Norwegian Business School (BI).

According to the Norwegian Research Council, Oslo and Akershus are sixth on the list of European re-

<sup>26</sup> The four NCE's in the Oslo Region are NCE Oslo Cancer Cluster, NCE Systems Engineering Kongsberg, NCE Micro- and Nanotechnology, and NCE Smart Energy Markets. For more information about these and other NCE's see: <http://www.nce.no/no/NCE-kltygene/>

<sup>27</sup> See <http://www.osloregionen.no/wp-content/uploads/Kartlegging-av-n%C3%A4ringsnettverk-i-Osloregionen.pdf>

gions with the highest R&D investments per capita<sup>28</sup>. Oslo and Akershus County are by far the most research-intensive regions in Norway; nearly half of all privately funded R&D in Norway is conducted in Oslo and Akershus. Buskerud – also a part of the Oslo Region – is, however, the county with the highest share of private R&D, mainly due to the hi-tech and engineering companies in Kongsberg.

National policies have emphasised consolidating the institutions with higher education through mergers and division of labour. The University for Life Sciences, Oslo and Akershus College and Buskerud and Vestfold College have all recently been established through mergers.

The Research Council of Norway administers several funding schemes for the establishment and operation of specially designated centres of research. These schemes comprise the Centres of Excellence (SFI), the Centres for Research-Based Innovation (SFF), the Centres for Environment-Friendly Energy Research (FME), and the Norwegian Centres of Expertise (NCE). The centres are affiliated with Norway's top universities and independent research institutes. Currently, Oslo hosts 15 of these centres of research (9 SFF, 4 SFI and 2 FME).

Norway has a great need for people with high levels of professional skills across a broad spectrum of fields. It is a goal that everyone should be able to get an education regardless of their social background. Welfare schemes for students are an instrument that can be used to achieve this. The Norwegian government wants to change the structure of higher education to achieve more solid specialist research communities and high quality education<sup>29</sup>.

Oslo Knowledge Partnership (Kunnskap Oslo) is a collaborative alliance that includes the city of Oslo and institutions for higher education and research in Oslo. The alliance was established in 2008 and works to position Oslo as a national and international knowledge hub in selected areas. The aim is to strengthen Oslo's attractiveness as a place to study, do research and innovate for talents from all over the world. The focus is on profiling and marketing, talent reception and integration, and collaboration to stimulate innovation.

### 3.2.6. ECONOMIC DEVELOPMENT AND FORECAST

Norway has one of the world's strongest economies. At the same time, the country's open economy is vulnerable to cyclical changes in the international economy, and especially the international market

for oil and gas.

The country's gross domestic product per capita from its population of 5 million is 91% higher than the European Union average. Norway's mainland economy has been partially insulated from global financial turbulence and oil price volatility, reflecting the well-functioning fiscal framework governing oil revenues. After solid GDP growth in 2004-07, the economy slowed in 2008, and contracted in 2009, before returning to positive growth in 2010 and onward.

Big investments in the oil sector have helped keep Norway's economy solid in recent years, while many other European countries faced sluggish growth or even recession. But at the end of 2014 and beginning of 2015, several signs are indicating that Norway's economy may slow down. The price of oil has been reduced by as much as 50 %, and is expected to remain at low rates for a significant period of time. A survey by Statistics Norway in December 2014 said oil companies expect to reduce investment spending by 14% in 2015, which could drag the country's economic growth down to 1% from 2.6% in 2015<sup>30</sup>.

Norway's biggest newspaper recently stated that Norway's economy is now heading into a long period of uncertainty<sup>31</sup>, where Norwegians cannot expect to retain higher growth in salaries than other European countries. The main reason for this is the reduction in oil and gas related investment, as well as the ripple effect of this to the rest of the Norwegian economy.

Although Norway will remain among the richest countries in the world, it is dangerous to underestimate the challenge these changes entails. Experience from other countries such as Finland show how hard it is for a country to change course when former growth engines in the economy no longer have the same effect (Aftenposten, 30th December 2014).

Oslo's economy is closely linked to the cycles in Norway's economy in general. During the international economic crisis in recent years, Oslo has managed quite well, although the effects have been felt here. As indicated by figure 6 in section 3.2.1, there was a reduced growth rate in the number of new jobs created in the Oslo Region from 2009–2014, something that is believed to be an effect of the international economic crisis. It is also important to observe that some parts of the region were hit harder than others, especially Ringerike in Buskerud, and parts of Hedmark, Oppland and Østfold. Experiences from former shifts in the economy indicate that Oslo's

business sector is more sensitive than most parts of Norway. In other words, the changes we are now seeing in the global economy will potentially have a severe impact on employment and economic growth in the Oslo Region in the years to come.

Looking farther into the future, oil and gas are limited natural resources, and the ongoing effort to reduce global dependency on non-renewables due to climate change is likely to have a significant impact on the Norwegian economy. What is happening now may therefore be advance notice of the challenges Oslo's and Norway's business sector and economy will have to confront in future decades.

### 3.3. The relationship between Oslo and other parts of Norway

The core-periphery tension between Oslo and the rest of Norway has a long history in Norwegian politics as a defining line of conflict. However, it is important to remember that this is not unique to Norway, and is instead a familiar trend globally.

Norway's rural geography with regions that historically have had limited direct contact with each other has produced local and regional independence from central power. Norway's history, with long periods of strong Danish and Swedish influence over central powers, increased the resistance and scepticism towards central institutions in Oslo. Differences in culture, language and lifestyle often underpinned this conflict dimension further. One of the outcomes of this is the belief that districts outside of Oslo should have special representation in the national parliament, which is still the basis for the national election system. The representatives are also seated according to which county they are elected from – not according to party affiliation - in contrast to most parliaments in other countries. The traditional focus on representation and equality between the different regions in Norway has also underpinned national policies that have aimed to limit urbanisation through migration from the rural areas to the cities, especially Oslo. This is also the motivation behind policies that have been specifically aimed at creating and supporting business in rural districts and regions.

In economic matters, the relation between the different parts of Norway are in reality based on complementarity, with the division of labour between extraction and refinement of raw materials and natural resources, agriculture and manufacturing on the one hand, and more knowledge-based services and decision making functions on the other. As an example, the activity within fish farming, which has had significant growth in the last decades along the coasts of Norway, would not have been possible, were it not for the R&D in this field conducted by the University for Life Sciences in Ås in the Oslo Region. Not all, however, recognise this relationship, and there is still a belief among some that most value creation takes place in other regions in Norway, while the Oslo Region reaps the benefits.

In national policy, the belief that the big cities are important engines in the economy has gradually come into the forefront. The capital's role as a gateway to international relations and markets is also increasingly recognised and acknowledged across political boundaries.

Still, the scepticism towards Oslo in the Norwegian public opinion remains. Virke, the Enterprise Federation of Norway, has conducted a study about Oslo's reputation compared to the other major cities in Norway<sup>32</sup>. The study shows that Norwegians generally have a less favourable impression of Oslo compared to the other large cities in the country. Oslo is perceived to have higher crime rates and to be a less safe place to visit, work, live and raise children. However, Oslo is more favourably perceived as place for science and research as well as higher education, although not as positive as Trondheim.

<sup>28</sup> [http://www.osloregionen.no/wp-content/uploads/proj\\_2013-06-14\\_kunnskapsgrunnlaget.pdf](http://www.osloregionen.no/wp-content/uploads/proj_2013-06-14_kunnskapsgrunnlaget.pdf)

<sup>29</sup> <https://www.regjeringen.no/en/topics/education/higher-education/id1415>

<sup>30</sup> <http://www.oecd.org/eco/outlook/norway-economic-forecast-summary.htm>

<sup>31</sup> <http://www.aftenposten.no/meringer/heder/Den-nye-normalen-i-norsk-okonomi-7843724.html>

<sup>32</sup> See the full report here:

[http://www.virke.no/talloganalyse/regional/Documents/Omdommebarometer\\_Oslo\\_Web%20%282%29.pdf](http://www.virke.no/talloganalyse/regional/Documents/Omdommebarometer_Oslo_Web%20%282%29.pdf)

# 4. Current status

## 4.1. Important strategies, plans and projects to improve Oslo and the Oslo Region

Important strategies, plans and projects to improve Oslo and the Oslo Region

Both a broad set of national and regional policies and initiatives directly and indirectly affect the brand management of Oslo. As this is a fluid, fast changing and political field, we do not have an ambition to list all of the initiatives in this document, or to take all of them into account, but a select list can be found at [www.projectosloregion.no](http://www.projectosloregion.no).

Important regional strategies are those that can be strengthened by, or function as a central premise for, the brand management activities. The regional innovation plan of Oslo and Akershus County, setting the targets for innovation and entrepreneurship, is a typical example. The innovation strategy highlights the development and internationalisation of the Oslo start-up scene, the development of innovation networks and clusters, cooperation between educational systems, research institutes and business, and the commercialisation of research. All of these areas can be strengthened by, and function as important elements into, brand management initiatives. Buskerud County has recently developed a similar plan, and several municipalities in the region have also adopted their own plans for business development.

Similarly, the city of Oslo has produced a strategy for the development of the cultural industry, which highlights important features of Oslo that attract talent and visitors, and a knowledge strategy that strengthens Oslo's attractiveness as a place to study, research and innovate.

All municipalities and counties are obliged to adopt long-term master plans, which cover the whole spectrum of their responsibilities.

Infrastructure and transport is naturally at the core of the strategic development of fast growing regions. The city of Oslo, together with Akershus County Council, has recently proposed a regional plan for

transport and spatial development. Similarly the regions of Buskerudbyen, Hadeland and Nedre Glomma have developed their own regional plans. The Oslo Region Alliance is currently working on an integrated plan for transport and spatial development that covers the entire Oslo Region. At the national level, planning is underway for a new connection across the Oslo fjord and a new underground rail connection through Oslo. Together with regions in Sweden and Denmark, Oslo Akershus and Østfold have developed a plan for "The Scandinavian 8 Million City", an initiative to speed up the process of a high speed train that connects Oslo to Gothenborg, Copenhagen and the European continent.

## 4.2. How is the Oslo brand communicated today?

### 4.2.1. CITIZENS AND VISITORS

Given the definition of what a place brand is (section 2.2), all citizens and visitors in the Oslo Region are representatives of the Oslo brand through their communication with non-residents. This interpretation, which highlights the bottom-up approach to what constitutes a brand and how it is communicated, has increased significance with social media as a channel of communication. A pilot study from students at the BI Norwegian Business School (Pangopoulous et al, 2013) has looked at how Twitter can be used as a channel for making Oslo more visible internationally. The study, which is also based on the case of @sweden<sup>33</sup>, concludes that there is great potential for increased international recognition through social media.

Twitter, Facebook, Instagram and other social media channels are already being used in ways that communicate the Oslo brand to different audiences and target groups regionally, nationally and globally. One example is #stakkarsoss<sup>34</sup>, a grassroots initiative with an ironic approach, focusing on the qualities of Oslo. Other examples are 'Min vakre by - Oslo (liten by - store kontraster)' and the many 'Du veit du er fra....' sites on Facebook. The significance of these initiatives in relation to how the brand Oslo is per-

ceived internationally should not be underestimated.

### 4.2.2. PROFESSIONAL ORGANISATIONS AND NETWORKS

Visit Oslo is the official marketing organisation for Oslo and the surrounding region. It is responsible for visitor services such as the tourist information office and the official website [www.visitoslo.com](http://www.visitoslo.com). The organisation works actively with journalists and other important target groups globally, with a focus on conventions, events and traditional tourism. Visit Oslo gathers information about Oslo's international media footprint, as well as other forms of monitoring about Oslo's international 'buzz'. It also has a coordinating role for the promotion of the Oslo Region, and is currently the most professional agent acting on behalf of the Oslo brand.

Oslo Business Region AS is a limited company owned by the City of Oslo. The company combines international profiling, place positioning and information with start-up support services, talent and investment recruiting, and regional business development. Among other areas, Oslo Business Region works to highlight Oslo as a city of talent, particularly through digital channels, to attract more talent, companies and investors in order to increase the region's value creation. Oslo Business Region also works with monitoring and analysing international rankings, indexes and benchmarks to keep an overview of Oslo's performance in business, innovation and entrepreneurship, and to identify strengths and challenges.

The Oslo Chamber of Commerce (OCC) is a private organisation. Most of the OCC's members are located in the Oslo Region. As one of its tasks, the OCC works with services for expats to deliver information about the Oslo Region as a place to work and live.

The University of Oslo and other universities and higher education institutions work to attract students and academics. The higher education institutions in Oslo and have formed the alliance Kunnskap Oslo (Knowledge Oslo). In 2014, the alliance adopted a common strategy which emphasised the strength-



ening of the host services and functions for students and researchers, and provided cooperation over the promotion of Oslo as a region of knowledge.

Oslo Airport (OSL) cooperates closely with Visit Oslo, but is also an important organisation itself, promoting Oslo as a hub for international and intercontinental flight connections. Among other channels, OSL is active on social media. According to Airports Council International, the airport's Instagram account has the largest impact among European airports, and is the second largest account in terms of the number of followers.

The Nobel Institute and The Norwegian Nobel Committee indirectly contribute to the promotion of the Oslo brand, shaping the perception of Oslo and Norway abroad, and attracting huge media interest.

Business networks and clusters in the region also focus on the Oslo brand in their communication with international target groups. The Oslo Metropolitan Area (OMA) is a non-profit organisation representing the real estate business and urban developers in the Oslo Region. It is organised as a public-private partnership and includes the support of public authorities in the region. Its objective is to participate in the annual international real estate exhibition, conference and networking event Mipim in Cannes, and to promote The Oslo Region as the most attractive Scandinavian region for global investors and companies. Other networks such as Oslo Maritime Forum, ICT Norway, Subsea Valley, Oslo Cancer

<sup>33</sup> Read more about Curators of Sweden and @sweden here: <http://curatorsofsweden.com/about>

<sup>34</sup> <http://stakkarsoss.no/>

<sup>35</sup> <http://www.projectosloregion.no/wp-content/uploads/2015/02/Kunnskapsstrategi-for-Oslo-2014-17.pdf>

Cluster, Oslo Medtech, and NCE Systems Engineering also contribute to the promotion of the Oslo Region and the Oslo brand through their events, newsletters and participation at international conventions, exhibitions and other arenas.

Innovation Norway is the Norwegian government's most important instrument for the development of Norwegian enterprises and industry. Among other tasks, Innovation Norway is responsible for promoting Norwegian enterprises, as well as promoting Norway as an attractive tourist destination. Although the main focus has traditionally been on promoting rural areas of Norway, the focus has recently shifted towards a greater emphasis on the country's major urban regions, including Oslo. Innovation Norway is the government's official trade representative abroad with offices in more than 30 countries worldwide.

Organisations representing Norwegian business through federations at the national level, such as NHO and Virke, are together with branch organisations and regional offices participating in the promotion of businesses that represent the Oslo brand. The intensity of this work varies between the different departments within these organisations, with hi-tech and tourism related sectors being the most prominent.

#### 4.2.3. MUNICIPALITIES AND COUNTIES

There are several initiatives at municipal and county level that directly or indirectly contribute to the promotion of the Oslo brand.

The city of Oslo has an ambitious strategy for participating in international cooperation through EU-programs and organisations such as Eurocities, C40, The Gothenburg-Oslo cooperation and The Scandinavian Arena. The city of Oslo also cooperates with several international partner cities.

In 2010, the city of Oslo adopted an international strategy to promote Oslo's position and interests as a city internationally. The main objective is to portray it as an attractive city, and thus strengthen Oslo's international competitiveness, attractiveness for international talent, and location of business and for visitors. The strategy points to Visit Oslo and Oslo Teknopol IKS (now Oslo Business Region AS) as the main agents on behalf of the city in these areas. However, through participation in international organisations, the hosting of study visits for foreign delegations, and the promotion of the city's own cultural institutions such as the Munch museum, the Vigeland Park and Museum and the hosting of sever-

al major sports events, the city of Oslo is also engaged directly in promotion of the Oslo brand.

The counties Akershus, Østfold, Buskerud and Hedmark participate in several arenas for international cooperation, and support initiatives within the tourism, business, culture and sports sectors. The city of Oslo, together with the seven counties in Eastern Norway, also cooperates within the Eastern Norway County Network<sup>36</sup> (Østlandssamarbeidet), the Oslo Region European Office<sup>37</sup> (Osloregionens Europakontor), and several EU programs and international organisations. For example, the Eastern Norway County Network also has an agreement of cooperation with state of Schleswig-Holstein in Germany.

Some municipalities have also formulated strategies with clear ambitions in relation to attractiveness. Examples of this are the cities Drammen, Hamar and Kongsberg, which are engaged in projects with the aim of promoting the municipalities' attractiveness domestically. In 2013, Kongsberg adopted a business development strategy<sup>38</sup>, with attractiveness for talent and business as two of the most important objectives.

Among the municipalities in the Oslo Region, there are also cases of initiatives which directly or indirectly contribute to the promotion of the Oslo brand. For example, Øvre Romerike Utvikling (ØRU) participates in interactional arenas and organisations with the aim to promote OSL and ØRU as an airport region.

The Oslo Region Alliance, which consists of 78 municipalities and four counties, has had international positioning of the Oslo Region as one of its main objectives since it started in 2004. The alliance has cooperated closely with OMA and the Oslo Region at Mipim. The Alliance has also worked with Oslo Teknopol IKS (the predecessor for Oslo Business Region) in exploring the basis for improving the perception of the region internationally. The board of the Oslo Region Alliance has both in 2012 and 2013 supported the need for a strategy to improve the Oslo Region's international position through coordinated profiling.

#### 4.2.4. PRIVATE COMPANIES

Private companies are traditionally concerned with promoting their commercial brands. However, several companies have also ascertained the necessity of promoting the Oslo Region, especially linked to recruitment of highly skilled talent. Major international companies such as Statoil, Telenor, GE Health,

FMC, Aker, DNV, as well as many of the smaller companies where specialised talent is a critical factor, focus on place attractiveness in their efforts to recruit international employees.

For some businesses, there is also a need to promote the qualities of the region with regard to existing products and services being offered in the Oslo Region, as well as attracting business partners and investors. Encouraging the location of related businesses can also help strengthen existing companies and build specialised clusters.

#### 4.2.5. EVENTS AND CULTURAL INSTITUTIONS

The Oslo brand is communicated through the international coverage of sports events, concerts, exhibitions and cultural institutions. The Oslo Region and, particularly the city itself, has a long tradition of being the winter capital for Nordic sport.

As documented in the report by Clark and Moonen (2015), Oslo has earned significant interest for recent additions to Oslo's culture scene, such as the new opera house, the Astrup Fearnly Museum, the National Museum for Art, the Much Museum and the City Library. According to a recent report (Leikvoll & Kleppe 2014: 9), in a domestic context, Oslo especially stands out within cultural sectors such as museums, concerts, stage performances and the number of artists residing in the City.

Oslo has also gained recognition for its vibrant music scene, with several internationally renowned music festivals. According to Monocle magazine (2014), Oslo hosts more shows per capita than any other city in Europe, with some 5.000 live performances a year, double the number of Stockholm or Copenhagen. It is also host to the world's largest shipping convention, NOR shipping, as well as the world's largest football tournament for children, the Norway Cup.

These events and institutions, how they are promoted and how they are reported, are also instrumental in the communication of the Oslo brand.

#### 4.2.6. TOO MANY 'OSLO'S' – A LACK OF COORDINATION

As we have shown in this chapter, there are several stakeholders currently involved with, and who have an interest in, how the Oslo brand is communicated internationally.

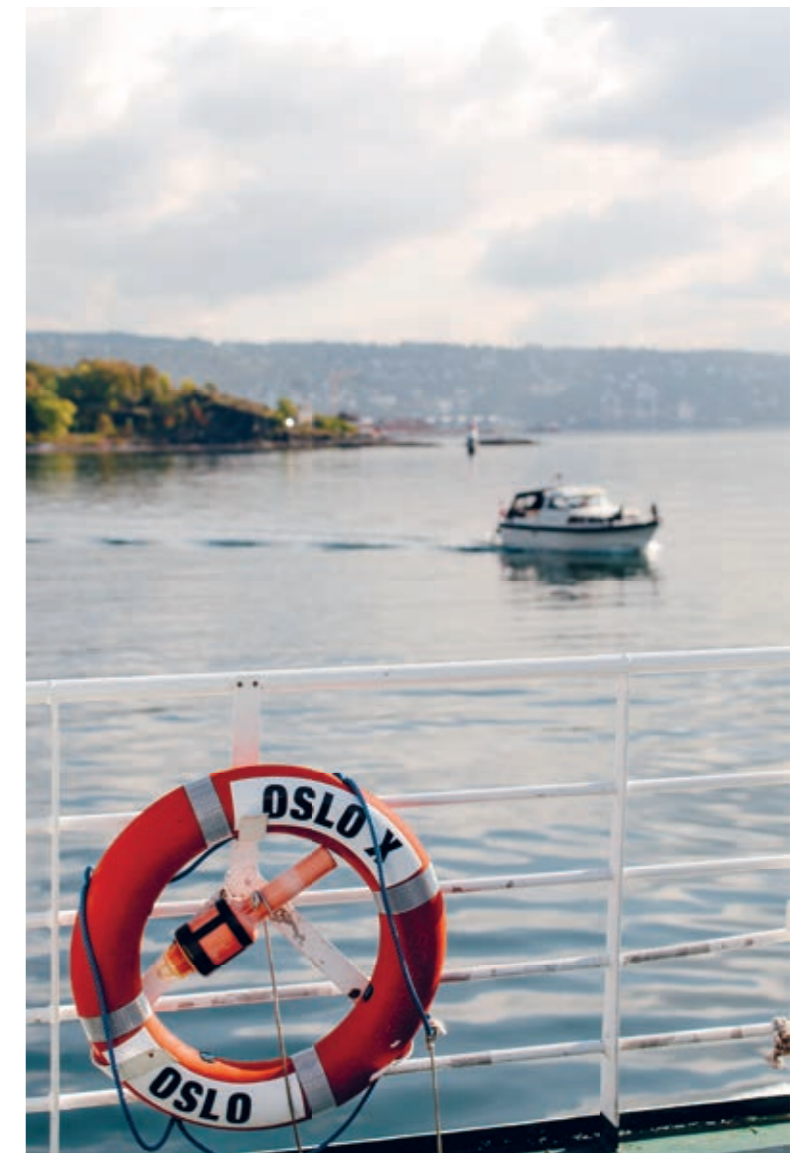
Looking at the current efforts, there are several important observations:

- Firstly, although there are many stakeholders involved in these efforts, there is currently a lack of coordination with respect to what is on-brand/off-brand. The consequence is that there is no clear and consistent com-

munication of Oslo's comparative strengths, and the region misses out on the full range of benefits that synergies could achieve. Simply put: there seems to be too many 'Oslo's'.

- Secondly, the current resources are limited. The reason may on the one hand be the lack of urgency among certain stakeholders, or on the other hand a lack of knowledge about how such resources could be spent in an effective way. A lack of partnership between public and private stakeholders may also result in reluctance among stakeholders to participate, particularly private organisations who are uncertain about investing.

At the same time, it is also important to note that the current efforts and initiatives represent a good basis from which a coordinated and strong promotion of the Oslo brand on behalf of the stakeholders in the Oslo Region can be formed.



<sup>36</sup> <http://www.ostsam.no>  
<sup>37</sup> <http://www.osloregion.org>  
<sup>38</sup> <http://www.kongsberg.kommune.no/Global/N%C3%A6ringsutvikling/13.07.31%20N%C3%A6ringsstrategi%20dokument.pdf>

# 5. Oslo in a globalizing world

## 5.1. Important trends

Ongoing global economic integration, lower cost transport, and technological innovations are increasing both the competition between cities for increasingly mobile assets and opportunities, and the number of internationalising cities whose roles in trade, services, migration and labour exceed national boundaries. Cities today must directly compete in national, regional and global markets in order to attract talent, firms, capital, tourism, students, workers, innovation, global events and intergovernmental institutions. More of the content of city economies is now contested through international competition. This competition drives cities to become more open, innovative, appealing, investment ready, and invites them to define their niches and specialisation more precisely, in wider markets than their nations or continents. The new cycle of global development brings together multiple forces that will shape the world for at least the next 30 years:

- The global economic centre of gravity is shifting east and south
- New global middle classes are emerging; they are mobile and have global reach
- Global urbanisation is unrelenting, reshaping the economic and spatial balance of nations
- New and emerging business sectors are internationalising and integrating at great speed
- Technology is driving new systems of exchange, production, and integration
- The drive for resilience and carbon reduction is re-engineering our energy, transport, building, waste and water systems and usage

For cities in the 21st century, these six forces generate new modes and choices, and they bring increased competition. Cities can pursue new economic niches, lifestyle choices, operating platforms, and trading partners. There are new business and trade paths into economic globalisation for cities. Many cities are globalising for the first time. Unlike in previous cycles when only a small number of 5-10 cities were truly international, the current era offers the prom-

ise of internationalisation for over 100 cities pursuing different routes into global engagement. It is no longer essential or sufficient to just be a national capital, a port city, a corporate centre, or a financial services hub in order to be recognised as a global player.

For Oslo, this means that the city and region need to have a clear path to their global future. What roles will the Oslo Region play in serving markets and clients beyond Norway? How will the region add value to the Norwegian economy? What will Oslo become known for as the region differentiates itself from other cities that are seeking similar opportunities?

Oslo is one of a new set of international cities that is emerging, pioneering a new way to internationalise. Oslo's peers are hubs of digital, scientific, and environmental industries which produce new film, TV and cultural content for global consumers and provide R&D facilities for global firms. They incubate and spread innovation and entrepreneurship. The cities offer small businesses a superb eco-system for growth and global trade and investment. When open, Oslo's peers become magnets for enterprising migrants that want to locate in a new entrepôt. These cities also attract students from several continents, and are destinations for tourists and conventions seeking to combine desirable urban lifestyle with business or pleasure. These cities host global decision-makers at summits, corporate retreats, and unique global gatherings. Essentially, these are cities of opportunity that enrich talent and assets so that they can succeed.

Oslo and its peers can become globally oriented, and not only as international centres of finance like London and New York. Instead, these cities can become global hubs for knowledge and technology (San Francisco, Tel Aviv), competitive producers of cultural content (Seoul, Mumbai), or lifestyle capitals and tourism destinations (Barcelona, Sydney) (Clark and Moonen 2013). Oslo is on a path to becoming a new kind of world city performing gateway functions for Norway that no other place can offer, serving the nation by facilitating internationalisation in investment, talent attraction, visitors, and exchange.

### 5.1.1. BENCHMARKING AND RANKING THE CITIES

Global competition between cities has increased inter-city comparison. Measuring and comparing city performance has become a key tool for understanding the processes of urban change, and for judging which policy and development approaches are successful. A flourishing quasi-academic field has emerged as a result, seeking to measure the success of cities by way of benchmarking, indexes and comparative reports. Businesses have innovated in using their management science of 'benchmarking' and applying it to cities. Hence, we have seen the firms such as PwC, Mercer, Siemens, MasterCard, AT Kearney, Knight Frank, and McKinsey leading the way on city benchmarking.

Oslo is performing well in these comparative benchmarks when the city is listed, but it is not yet a well-known city and is often absent from key measures and benchmark reports. Oslo is among the most liveable cities in the world. By global standards, it has been a highly prosperous and successful trading city for some time, and has evolved significantly in recent business cycles. Wholesale and retail trade remain essential to the Oslo metropolitan region, but finance and the commodities sectors have also boomed since the mid-1990s, changing the character and development patterns of the region. In particular Oslo has emerged as a globalising region, especially in terms of its attraction to firms, investors and talent. Today, Norway's capital is ranked the 79<sup>th</sup> most globalised urban economy. It is intensifying its international networks and also maintaining its established strengths in infrastructure, knowledge, smartness and sustainability.

### 5.1.2. GLOBALISATION DRIVES URBANISATION.

The current cycle of globalisation sees increased numbers of cities embrace international opportunities, drive value creation, and achieve performance that is more closely linked to global than national demand. This globalisation also drives further urbanisation; it makes cities grow.

Every two years the proportion of the world's population living in cities grows by around one percent<sup>39</sup>. In the developing world, where over 90% of urban growth is occurring, cities are absorbing close to 70

million new residents each year<sup>40</sup>. Cities' growing share of population is also mirrored by a growing share of corporate and enterprise locations. In the UK for example, eight of the ten largest cities have seen private sector jobs become more concentrated in their city centres<sup>41</sup>.

Urbanisation has been a key mega-trend of the last century. More than half of the world's population now lives in cities. By 2050 this figure is projected to rise to more than 70%<sup>42</sup>. The promised potential of global urbanisation and the re-urbanisation and evolution of metropolitan regions that go with it, is that it could secure increased productivity, enhanced sustainability, and reduced inequality, and therefore make a substantial contribution to human development. But urbanisation has also increased the challenges which cities face, and threatens cities with its potentially negative and unusually unequal impacts. It falls to city leaders to ensure that urbanisation is harnessed as a catalyst for positive change.

In economically developed countries, the scale of urban expansion, which began with the Industrial Revolution, has stabilised<sup>43</sup>. In most cases cities are densifying and becoming re-populated with the rise of the knowledge economy and changing lifestyle and transport preferences, which together are beginning to reverse the low density suburbanisation of the second half of the 20<sup>th</sup> century. With re-urbanisation comes new business locations in cities, including the densification of business districts, the rise of the second and third districts, new campus city centre locations, new innovation districts and the redevelopment of old industrial locations into new corporation and enterprise hubs. In some cities of the developed world rapid urbanisation continues and is producing fast growing cities with an increasingly metropolitan and regional flavour.

Oslo is a distinctive city in the global north. It is now in an important cycle of increased urbanisation, metropolitan growth, and regional integration. Norway is young country and Oslo is a relatively young city. In the current cycle of growth, Oslo is attracting population at a rapid scale and it is developing new industries and new assets with great speed.

<sup>39</sup> <http://www.oecd.org/env/indicators-modelling-outlooks/49910023.pdf>

<sup>40</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTURBANDEVELOPMENT/EXTURBANPOVERTY/0,contentMDK:20227679-menuPK:473804-pagePK:148956-piPK:216618-theSitePK:341325,00.html>

<sup>41</sup> See: <http://www.centreforcities.org/publication/beyond-the-high-street/>, <http://epress.lib.uts.edu.au/journals/index.php/cijg>

<sup>42</sup> UN State of the World's Cities 2012/3 available at <http://mirror.unhabitat.org/pmss/listItemDetails.aspx?publicationID=5387>

<sup>43</sup> <http://www.citylab.com/housing/2014/02/developing-worlds-urban-population-could-triple-2210/8431/>

Figure 6: Fastest growing cities in Europe from 2004 to 2010

City	Growth 2004 –2010
Oslo	12.9 %
Malmö	11.9 %
Manchester	11.2 %
Stockholm	11.2 %
Murcia	10.6 %
Palma de Mallorca	9.7 %
Brussels	9.0 %
Bergen	8.1 %
London	7.9 %
Cardiff	7.8 %

5.2. Imperatives for the Oslo region

Given the global context and the internal dynamics of change in Oslo, and its visibility and invisibility in global scans and horizons, we observe 3 key reasons why we in Oslo should act decisively to build its vision, visibility, identity and reputation.

- I. **Coming of age and shaping the future.** Oslo is a young and fast growing city-region that is in a critical stage of development now. The world does not yet fully know Oslo because Oslo does not yet fully know itself. It is becoming a major metropolitan region and it is integrating as it grows. 78 neighbouring municipalities are rapidly becoming interdependent and share a common destiny. Oslo needs a regional vision based on its real character now to help shape its future and encourage common purpose amongst its many leaders. It is time for Oslo to define itself and assert its identity. It must offer its citizens, customers, investors and friends a story of the future which is true, ambitious, confident, and hopeful.
- II. **Position Oslo for Competition and Innovation.** We are living in an urbanising world. Cities are crucial assets for nations and the innovations of cities, and competition be-

tween cities, are both intensifying. In particular, Oslo’s near neighbours and its closest competitors are raising their game and competing hard for attention and recognition. Oslo must be innovative and competitive if it is to succeed and win benefits for citizens, for investors, for businesses, and for Norway. Oslo must be projected and promoted in the face of competition and it must know and communicate its distinctive advantages, and tackle its disadvantages consistently and systematically. Oslo needs to attract Talent, Investment, Innovators, and Institutions. Overall Oslo needs to be more visible and recognised for the city that it is. Within this competition, Oslo also needs to protect its distinctive niches in the face of competition.

III. **Diversification and a global gateway for Norway.** Norway is a thriving young country that faces important choices and some risks. Oslo can provide Norway with a dynamic and efficient capital city that can support the nation, be a gateway for talent and tourists, and be an important potential source of economic diversification and identity in an otherwise narrowing national economy that risks ‘lock in’. Oslo is an insurance policy against oil dependence. Norway needs a successful Oslo and a shared vision is essential.

These three imperatives demonstrate the need for a more organised an orchestrated endeavour to communicate the essence and core elements of Oslo’s vision, personality, character, and values. A common framework is needed to communicate Oslo so that Oslo can work together as team. Without a common framework all municipalities, universities, firms, associations, journalists, and others communicate different ideas, concepts, and propositions and the

result is that Oslo becomes less distinct and visible. The more the messages the worse the overall message is.

So, this need is clear: Oslo must move to a more deliberate and coordinated system of telling the world what it is and how it can pioneer and enrich people lives, ventures, and leisure experiences.



# 6. Norway Brand and Scandinavia Brand

## 6.1. Relationships between place brands

Much the same way as Oslo is a part of Norway, it is also part of a larger region: Scandinavia. As a result, Oslo has a share in both the Norway brand and the Scandinavia brand. These two place brands help shape the perception of Oslo in an international context. In some cases, it can be difficult for international observers to separate characteristics which are associated with some of these brands, but not others. In cases where the brands share certain characteristics, this may help to strengthen the perception of them as part of all of the same brands. Examples of this may be the Scandinavian models of governance and welfare systems.

In other words, the Norway brand and the Scandinavia brand (which is sometimes, but not always, the same as the 'the Nordic brand') will be an important part of the context for the Oslo brand, and will influence the way that it is perceived by an international audience. In this chapter we will briefly present the two brands within which the Oslo brand is nested.

## 6.2. Scandinavia brand

The Scandinavia brand is a product of common Scandinavian traits. The New Yorker Magazine sums this up as follows <sup>44</sup>:

*“What unifies the Scandinavians is at once specific (social-democratic government, mutually intelligible languages, a love of sauna) and ineffable (something to do with modesty, a naturalistic cast of mind, and candles). If trivial things are vital to the French, as Mark Twain once suggested, Nordic culture runs to the soft power of a hard settee.”*

Several magazines have in recent years focused on the success of the Scandinavian model of govern-

ance. The Economist claims that the Scandinavian countries are the best governed countries in the world, and point to the following characteristics <sup>45</sup>:

- Honesty and transparency of government
- Pragmatism and tough-mindedness
- Trust in strangers
- The belief in individual rights

According to the Danish academic Lene Rachel Andersen, there is a stream of thought and shared values running through the Nordic societies and politics, which qualify as an ideology <sup>46</sup>:

*The Nordic countries are often identified, by Nordic people and others, with equality, human rights, democracy, low levels of corruption, high levels of trust and happiness, and an overall humanism and fairness in our various affairs. Some call it naivety (e.g. the saying “blue-eyed like a Swede”).*

*These phenomena are not the core of the Nordic ideology, though, but the consequences of something much deeper, namely what is truly the core of Nordic “soul”: the individual human being and his or her dignity and integrity. The backbone of Nordic values, politics, society etc. is the persona and the life-long development of each individual personality.*

## 6.3 Norway brand

In 2014, GfK Public Affairs & Corporate Communications conducted a study into Norway’s international image. <sup>47</sup> The report focuses on six main themes: exports, governance, culture, people, tourism and integration.

According to the report, Norway is ranked in the top two tiers within all of these themes, except culture. The more detailed categories show that it is especial-

ly in cultural heritage, historic buildings, and contemporary culture, where Norway is perceived less favourably by the international community.

The best categories for Norway are the environment, peace and security, rights and fairness, competent and honest, equality in society, quality of life and natural beauty.

The report also looks at how Norway is perceived in 24 individual countries. Norway enjoys a very good reputation in Sweden, Denmark, Germany, Finland and Poland. In contrast, the countries in the report

with the least favourable perceptions of Norway are Egypt, India, China, South Africa, Mexico and Argentina.

The report also looks at how Norway’s reputation has changed from 2008 to 2014. The overall improvement is best in Egypt, China, Canada, Brazil and Australia, whilst there has been a negative development in the perception of Norway in France and Argentina.

The report has an overview of the words most often associated with Norway within the six main themes, which include the following:

Table 3: Top three words associated with Norway within six themes. Source: GfK Public Affairs and Corporate Communications

Exports	Culture	People	Tourism	Governance	Immigration/ investment
High tech	Museums	Hard working	Fascinating	Reliable	Modern
Food	Modern design	Honest	Relaxing	Trustworthy	Forward thinking
Agriculture	Sports	Skilful	Exciting	Reassuring	Developing

<sup>44</sup> <http://www.newyorker.com/magazine/2015/02/16/northern-lights-4>

<sup>45</sup> <http://www.economist.com/news/special-report/21570835-nordic-countries-are-probably-best-governed-world-secret-their>

<sup>46</sup> <http://www.nextscandinavia.com/ideologies/the-nordic-ideology>

<sup>47</sup> See the report here: [https://www.regjeringen.no/globalassets/upload/ud/vedlegg/nbi2014\\_norway.pdf](https://www.regjeringen.no/globalassets/upload/ud/vedlegg/nbi2014_norway.pdf)

# 7. The Oslo Region according to the stakeholders

## 7.1. Input from workshops and interviews

Input from workshops and interviews  
As previously mentioned, #ProjectOsloRegion has conducted 14 workshops with a mix of key stakeholders, which have engaged 204 people (summaries from each group can be downloaded at [www.projectosloregion.no](http://www.projectosloregion.no)).

The content of the workshops was developed during the autumn of 2014, and was organised around three main questions:

- I. What are Oslo's main strengths?
- II. What is most crucial to improve, in terms of branding?
- III. Which stories should be told?

There have also been 23 interviews conducted with key opinion leaders. The topics for the interviews have mostly circled around the same issues as the workshops<sup>48</sup>.

The workshops and interviews have served a double function. Firstly, to give input to the strategy process, and secondly, to inform relevant stakeholders of the brand strategy. **#ProjectOsloRegion** also asked all interviewees and workshop participants if they themselves or the organisation that they represent, would be willing to actively support and contribute to the strengthening of the Oslo brand. Without exception, the response has been positive. The involvement process has also revealed an impatience to create a strong cooperative effort to strengthen the Oslo Region's international position on the part of many stakeholders, especially in the business sector.

In the following sections of chapter 7 we will summarise the main outputs from both the interviews and the workshops.

## 7.2. Workshops

### 7.2.1. PERCEIVED STRENGTHS

**Growth:** The key strength in the Oslo Region now is the actual growth of the city and region. This is

something everybody takes part in and can be felt in most parts of the region. The growing population pushes the region to think smart and improve the quality of infrastructure and services, albeit having to deal with criticism about capacity issues in many sectors. All the new developments generate business and cultural possibilities. The economic growth is important for the continued development of the society, and it is in itself a major asset that should not be taken for granted.

**Compact/short distances/closeness/egalitarian/easy access:** The single most mentioned quality is the short distances and closeness that characterises the region. This is both used as a geographical description, as exemplified by the relatively short distances within the city, as well as the recreational possibilities, with both the fjord and the forest surrounding Oslo.

Metaphorically - and even more underlined - is that short 'distances' also describes Oslo's egalitarian and non-hierarchical culture, and a general experience of relatively easy access to professional experts, politicians and business executives. Stories of accidental meetings with politicians, celebrities and people of power at the subway, in the street, or at a bar or restaurant, are commonly told by the participants.

**High quality of life and work:** The second most mentioned quality is Oslo's secure, stable, wealthy and predictable governance, combined with great career opportunities and enriching out of work activities. The ability to engage in both an international top-level career, and at the same time being able to take active part in social networks, leisure activities, raising of children and being with/nurturing ones family was highly desirable for participants. In short: they have a good work life balance. It is worth mentioning that this is in no contradiction to productivity, as the Oslo Region has the highest productivity per capita in the world. Oslo is a place for bright minds, great career, and good living; a place to fulfil your career, and at the same time, fulfil your life.

**Cooperation, co-working, and sharing:** Particularly within different groups of professionals/experts, the culture of 'Dugnad' - that everyone helps each other and takes part for the greater good - is an

often mentioned cultural trait. It is also used as an important asset to explain why a small city is able to foster highly skilled experts in a wide set of areas. This is related to, and explained by, egalitarian structures, a high level of responsibility on lower organisational levels, and cross-functional organisational structures driven by competence rather than power structures. These stories cover a wide range, from development of cocktail bars and music festivals, to entrepreneurship, innovation and academic excellence. It is also mentioned as the way sports and leisure time is organised, and how it is driven by volunteer work.

Oslo grows quickly, and the assets of cooperation and short distances help to organise and manage this shift. This is further strengthened by the global development of successful examples of products based on a 'sharing economy'. A growing sharing economy - ranging from open source and crowdfunding to co-working and social media - inherits traits that seem to be highly compatible with, and easily adopted by, the traditional Norwegian egalitarian culture of the "Dugnad spirit".

**Competence and knowledge:** With one of the world's highest educated workforces, Oslo is the knowledge capital of the knowledge driven Norwegian economy. As Oslo-based traders seldom are cost competitive on the global scene, the only option is to compete on knowledge and competence driven production. This is normally used as explanation of why the high cost, high productivity, and high educational level can co-exist as a competitive advantage. This asset is also used as the most important factor on explaining why talent comes to Oslo - talented professionals can normally find a thriving knowledge environment within their field of expertise, whether it is within restaurants and arts, or advanced research and innovation.

**Innovation:** Oslo has a dynamic and fast growing entrepreneurial scene. Its many start-up labs, incubators, co-working spaces and innovation networks have great future promise, and count as some of the most important elements for the future diversity of economy. The entrepreneurial scene and spirit also includes a rapidly growing field of social entrepreneurship and volunteer work.

**Strong urban and vibrant culture scene:** Oslo's culture is growing at an explosive rate and is becoming one of the strongest assets in the city. In all of the workshops in Oslo, this was pointed out as one of the city's most favoured qualities. This is unique in a national setting. Oslo is the only place in Norway where you have a truly cosmopolitan city culture. The food and coffee culture is gaining international recognition. The popular music scene is one of the most vibrant in Europe, where many music festivals

take place, led by the Øya festival, while within high culture the new opera house is leading the way within the theatrical and classical scene. The art scene is increasingly being discovered and hailed by the international market and media. Within design, architecture and fashion, Oslo is now producing global stars. Oslo is finding its cultural self, catching visitors by surprise. The active culture scene is a great asset for the growing city, and also the business segment of the city.

**Nature and seasons:** The proximity to nature is a unique part of the Oslo Region and is perceived as a major strength amongst its citizens. The ability to ski just 20 minutes away by subway, sail or swim in the fjord, go hiking, and pick berries or mushrooms in the forests were all highly desirable.

**Sustainability:** Oslo's high ambitions regarding sustainability and environmental technology were rarely discussed as a primary asset, even though the scores are well known and high. This may be because sustainability has become an implicit trait that is taken for granted, and not something to be prioritised. To work for sustainability is simply no longer optional; it has become a way of living.

### 7.2.2. WEAKNESSES/AREAS OF IMPROVEMENT

**General conclusion:** One of the most agreed upon conclusions from the workshops is that Oslo simply needs to get its story told. In short, the participants support the general 'closing the gap' motivation for the creation of a regional branding strategy process.

The feedback illustrates a general belief that Oslo's qualities are under-communicated, and that Oslo's development suffers from a gap between the experienced qualities, and the international outside-view-in perceptions - or lack thereof. Oslo's growth and high-level urban culture, its dynamics and high quality, are the most mentioned under-communicated qualities.

One often mentioned topic in this regard is that Oslo suffers from being associated with the national brand of Norway. There is a strongly expressed need to distance Oslo from the Norwegian tourist brand of trolls, nature and fjords and to take the deserved role as an international city with great urban qualities.

Additional weaknesses identified are related to different aspects of how foreigners are welcomed, and how this affects attractiveness. The workshop participants showed good self awareness and an understanding of the fact that newcomers to Oslo can experience difficulties of attaching to social networks.

**Welcoming to foreigners:** It is a general perception, that Oslo needs better services to welcome and integrate foreigners to the Norwegian culture. The

perception is that people come here because of relationships or knowledge/professional interest, rather than general attractiveness. There is a great need for systematic hospitality welcoming activities/instruments/tools, and to do more to attract families - expensive is a myth, if you have a Norwegian salary...

**Attractiveness for talent:** The Oslo region is a well-functioning society, with solid governance and leading knowledge environments. The governance system guarantees personal freedom. However, universities and schools are not seen as up to date with professional knowledge environments - there is a demand for better hi-tech universities and educational systems.

7.3. Interviews

At a general level, the interviews have confirmed the input from workshops concerning the region’s overall strengths and weaknesses. In addition, the interviews have provided insight into perspectives that are more specific and related to the different interviewees’ organisations.

One of the most remarkable outputs from the interviews is the positive response to **#ProjectOsloRegion** and the urgency for implementing actions to improve the Oslo Region’s international position. Underlying this is both a sense of new ambition on behalf of Oslo and the region, as well as a sense of urgency related to the changes in economic outlook and more fierce international competition for customers, talent, investments and influence.

Below are some of the key quotes from the interviews:

**Berit Svendsen, CEO Telenor Norway**  
Norway is perceived to be on the outskirts of Europe, but also seen as an advanced, exciting and affluent country. Norwegians are generally perceived to be competent and productive.

**Knut Olav Åmås, CEO Fritt Ord**  
During the past decade, Oslo has become a magnificent city for music, with a large number of concerts, stages and clubs with very good artists from both Norway and abroad.

Norway does have a historical handicap compared with Sweden and Denmark that it has never been a continental power. This you can observe in the other capitals, Oslo does not have the same historical aura. But this gives Oslo the possibility to rise as a new type of metropolis in the North, where the atmosphere and feel of a small city still is kept.

**Rune Bjerke, CEO DNB**  
The number of emissions at Oslo Børs is bigger than in Stockholm, Helsinki and Copenhagen combined. Oslo is an attractive finance centre. The world needs to know this.

**Thor Gjermund Eriksen, CEO NRK**  
Oslo needs to make some choices about what the City should be – and not be. Being the “winter capital” is nice, but it is not very likely to be enough.

**Rolv Erik Ryssdal, Schibsted**  
We must dare to take a position internationally. This cannot only be based on conveying the story about our high quality of life. It’s a better idea to position Oslo more specifically towards competence and capital.

**Olav Selvaag, Selvaag Gruppen**  
There are two possible areas [for the Oslo Region] to gain international recognition. One is competence and technology. The other area is finance. Oslo could be a new type of finance centre, based on the experience from managing the Oil fund.

**Torger Reve, BI Business School**  
Oslo should combine the competence from oceanic industries with environmental accountability and green technology.

**Stian Berger Røslund, Governing Mayor of Oslo**  
We have a stable economy, high quality of life, little inequality and a dynamic city culture, which together makes this a very attractive city.

**Morten Dæhlen, Decan at University of Oslo, Faculty of Mathematics and Natural Science**  
The University of Oslo will benefit from a profiling strategy if the Region communicates that we have a university which is competitive on a high international level. Although there may be different opinions about this, the reality is that the University of Oslo is the only Norwegian university that can compete with the best universities globally.

**Kari T. Jensen, Rector Oslo and Akershus University College of Applied Sciences (HiOA)**  
HiOA wants to attract the most talented students and teachers. We would like to have more international students.

**Bente Holm, Managing Director Visit Oslo**  
We are now in a period where there is increased curiosity about Oslo. This project has perfect timing, because now we can influence the future development, and that will have a positive effect on Oslo.

**Per Morten Hoff, ICT Norway**  
A challenge for Oslo is that everything seems to be going so well. There is no crisis, and we really have not had a crisis.

**Øyvind Hasaas, CEO Oslo Airport**  
Oslo needs to be more visible internationally. How Copenhagen and Stockholm have worked with this should be an inspiration.

7.4. Oslo perception survey

The Oslo perception survey was conducted as a strategic part of the **#ProjectOsloRegion** by a team from Oslo Business Region with methodological assistance from Martin Boisen (Boisen, 2015)<sup>49</sup>. The purpose was to produce fact based insights into the current perception of Oslo in a global context amongst stakeholders already familiar with Oslo. Both contacts currently residing within Oslo and those elsewhere were invited<sup>50</sup> to participate in the survey. The Oslo perception survey is primarily an inside-out analysis, measuring the perception of the stakeholders (how they perceive Oslo) and the projected perception of the stakeholders (how they think Oslo is perceived abroad).

The perception survey was structured around four themes: 1) business climate, 2) quality of life, 3) hospitality, and 4) governance. Each theme was split into four more detailed questions, bringing the total number of dimensions up to 16.

The average scores for each of the sixteen dimensions are represented in the spidergram below. The blue line represents the scores given by the 70 respondents currently not residing in Oslo. The red line represents the scores of the other 569 respondents, and the green line represent how these 569 respondents think that Oslo is perceived abroad.

The results of this survey therefore both paints a general picture of how Oslo is perceived amongst the resident and non-resident stakeholders (‘own perception’) as well as how the resident stakeholders think other people perceive Oslo (‘projected perception’). In this analysis, we will mainly focus on the resident stakeholders.

Figure 7: Spidergram Oslo Perception Study



<sup>49</sup> See the full report here: [http://www.projectosloregion.no/wp-content/uploads/2015/02/Inside-Out-Analysis-FINAL\\_DRAFT\\_SINGLEPAGE.pdf](http://www.projectosloregion.no/wp-content/uploads/2015/02/Inside-Out-Analysis-FINAL_DRAFT_SINGLEPAGE.pdf)  
<sup>50</sup> The survey was conducted as an invitation-only online survey, and the invitation was distributed to 13,666 relations. 4,326 contacts opened the invitation (32.4% of 13,666) and of these 639 completed the survey (14.77% of 4,326). A response rate of 14.77% is an average performance for such a survey.

It is clear from the spidergram that all three lines draw the same general shape. It is also clear that Oslo does not receive very low aggregated scores in any of the 16 dimensions.

Below, the results are presented in more detail.

7.4.1. BUSINESS

The survey results show neutrality in this theme. In general, the resident stakeholders’ own perception (red line) is slightly more positive than their projected perception (green line), which suggest that the stakeholders expect that the strength of the business climate is not recognised strongly enough abroad. However, the differences are very small, with all scores distributed closely around the 7.0 mark.

The competencies and knowledge score is good, which reflects the fact that the stakeholders are confident about awareness of the quality of themselves as entrepreneurs and their workforce. The other scores are a slightly less positive.

Quite a number of gaps can be identified in the above. Generally speaking, resident stakeholders awarded significantly lower scores to projected perception than they awarded themselves. This suggests that they expect a perception gap to exist wherein Oslo is not viewed as positively upon as they think Oslo deserves. This could demonstrate support for promotional activities and media strategies directed at global audiences.

Business climate	Own perception		Projected perception
DIMENSIONS	NON-RESIDENT	RESIDENT	RESIDENT
Business friendliness	6,43	6,9	6,53
Productivity and efficiency	6,53	6,76	6,94
Competencies and knowledge	7,14	7,35	6,99
Innovation and entrepreneurship	6,58	6,44	6,00

7.4.2. QUALITY OF LIFE

Quality of life is by far the strongest theme, with all four dimensions scoring well above 7.0. This is not surprising. Oslo, Norway and the rest of Scandinavia are traditionally viewed as societies with extensive welfare states that have succeeded in combining economic prosperity with societal fairness. It is therefore to be expected that stakeholders intimate with Oslo are aware and proud of this, and also believe this to be perceived globally.

Quality of life	Own perception		Projected perception
DIMENSIONS	NON-RESIDENT	RESIDENT	RESIDENT
Work-life balance	8,34	8,15	8,57
Culture and recreation	7,46	7,97	7,55
Personal safety	7,65	7,65	8,62
Sustainability and nature on offer	7,82	7,82	8,72

Although the number of non-resident respondents is comparatively low, it is interesting to note the difference between resident and non-resident perception for the culture and recreation dimension. For the non-residents, this is the weakest dimension within a generally strong theme. The resident stakeholders score this dimension more than a half point higher on average, producing a significant gap. It’s interesting to note that the residents themselves expect foreigners to have less favourable perception than the residents own. One can only hint at possible explanations here, but this could have something to do with the fact that the cultural scene in Oslo is developing rapidly, which non-residents may not be aware of. Another possible explanation could be that non-resident stakeholders predominantly reside in larger metropolitan areas that have more to offer.

For the other three dimensions, the residents generally believe foreigners to have a more favourable perception then they do themselves. Nevertheless, the self-perception of a strong quality of life is very positive.

7.4.3. HOSPITALITY

In this perception survey, hospitality is not limited to the industry of hotels, restaurants and the like, but in-

Hospitality	Own perception		Projected perception
DIMENSIONS	NON-RESIDENT	RESIDENT	RESIDENT
Flat structured and egalitarian	8,04	7,79	8,11
Attractiveness for international talent	5,98	6,29	5,99
Openness of the people	5,62	5,83	5,83
Friendly and welcoming to foreigners	5,86	6,09	5,84

cludes the general perceptions of the openness of the people, friendliness and attractiveness for foreigners. Hospitality is the weakest theme according to the results of this survey. Only the dimension flat structure and egalitarian scored above 7.0, and the other three dimensions around 6.0. Bearing in mind that the average score is 5.5, 6.0 is relatively weak, especially since resident stakeholders are less likely to award lower scores to their own place of residency.

The importance of hospitality should not be taken lightly. Oslo needs to attract and grow talent to maintain and improve its competitive advantage in a globalizing economy. Additionally, Oslo needs to improve its qualities as a destination for businesses and visitors to keep benefitting from the global streams of investments and tourism. The choices of both key decision makers and individuals are made under the influence of the availability of options and the perception of the quality offered by those options. A relatively low score in this theme is therefore a strong call to action for initiatives that improve the perception, performance and experience of Oslo in terms of hospitality.

In particular, the dimension openness of the people is critical, yet it scored the lowest of all sixteen dimensions.. This might reflect a general self-perception of Norwegians as being reserved and not easy to approach. Since changing the culture of the inhabitants of Oslo is not easy, this is an issue that needs to be addressed long term; actions should be taken to stimulate the international community in Oslo. Strategic, consistent and high-quality arrangements of arenas for meeting, exchanging and sharing experiences would be an important step, as would enhancing the public administration services for expats and international students However, improving the marketing intelligence on this issue is the first step towards addressing this issue.

7.4.4. GOVERNANCE

Governance in this survey refers to the collective society, its institutions, and individual participation. The results of this survey suggest a strong perception of Oslo in this regard. Three of the four included dimensions score above the 7.0 mark. At the same time, the dimension international influence and status has one of the lowest scores of all the sixteen dimensions measured in this survey.

Covernance	Own perception		Projected perception
DIMENSIONS	NON-RESIDENT	RESIDENT	RESIDENT
Individual freedom and personal opportunities	7,62	7,72	7,70
Societal quality and integrity	8,04	7,68	7,96
Social transparency and reliability	7,91	7,49	7,93
International influence and status	6,05	6,20	6,10

There is a strong belief in the transparency, reliability, quality and integrity of the institutions of the Norwegian welfare society. This belief plays a central role in the perception of quality of life.

The dimension international influence and status produces a low score of around 6,0. Collectively, these results give the impression that Oslo residents are modest, and that the region does not show itself enough on the global scene. These scores also reflect the reality wherein Oslo is one of the fastest growing capital of Europe, but still has little international presence and influence.

This is a dimension that should be explored in further detail within and outside this perception survey - especially since it has direct relevance to the international position of Oslo in a globalised world. Possible avenues of exploration are those of weak media coverage, absence from benchmarks, limited knowledge sharing, and sparse participation of Oslo in trendsetting agenda setting, and international city networks. Wise choices here might boost international influence by setting ambitious goals to influence the global agenda for smart cities, liveable cities, sustainable cities and other relevant trends that put focus on Oslo as an up-and coming city with something to contribute to the world.

7.5 Main findings

7.5.1. THE WORKSHOPS AND INTERVIEWS

The overall picture from the workshops is that the perceptions of stakeholders are aligned with the analysis, benchmarks, and 'outside view in' perceptions. In short, there is a shared and little disputed picture of the challenges, strengths and weaknesses of the city.

Below, we have summarised the input from the workshops as a SWOT table:

<b>Strengths:</b> <ul style="list-style-type: none"><li>Oslo: Big City "Beat", yet Compact and Walkable</li><li>Strong Economy</li><li>Culture</li><li>High Quality of Life and Close to Nature</li><li>Creative and competent citizens</li><li>Opportunities</li></ul>	<b>Weaknesses:</b> <ul style="list-style-type: none"><li>The law of "Jante"</li><li>High cost</li><li>Level of Hospitality</li><li>Regional Pride and Cooperation</li><li>Transport infrastructure</li></ul>
<b>Opportunities:</b> <ul style="list-style-type: none"><li>Competence and Knowledge</li><li>Sustainability and Accountability in Business</li><li>"Smart" and "Green" Infrastructure</li><li>International Cultural Appeal</li><li>Communicating Strengths</li></ul>	<b>Threats:</b> <ul style="list-style-type: none"><li>Low International Visibility</li><li>Economic Business Cycles</li><li>Norway's "Rural" Brand</li><li>More Ambitious and Cost-Effective Competitors</li></ul>

One of the most important conclusions is the need for more visibility. Second; the constant improvement of the region's qualities concerning hospitality and transport infrastructure. (The improvement of the transport infrastructure is already on top of the agenda for the decision makers of the Oslo Region) and third, to build on the Region's strengths to create new opportunities based on knowledge-intensive and creative industries. And fourth; to improve regional pride and cooperation.

7.5.2. THE PERCEPTION SURVEY

The results of the perception survey suggests that two of the themes are relatively strong ('Quality of Life' and 'Governance'), whereas one theme is relatively neutral ('Business Climate') and one theme relatively weak ('Hospitality'). In terms of strategic choices, based on this survey, the 'Quality of Life' and the 'Governance' are strong elements in terms of both the brand narrative and brand promise. It seems that Oslo is in a strong position to deliver upon such aspects of the place brand.

Furthermore, in a global context, these two themes resonate strongly with both 'Norway' and 'Scandinavia', and in some contexts even with '(Northern) Europe'. These strengths are not unique, but the combination of these two themes produces an image of a solid society with real value for current and future stakeholders. The inherent hierarchy between the two strong themes suggest that 'Quality of Life' is the most important, and 'Governance' working as a kind of hygiene effect. The governance structures of Oslo allows for a high quality of life, and for a thriving business climate. In terms of narrative, the 'Governance' theme could therefore be downplayed to matter-of-factness, while having 'Quality of Life' and 'Business Climate' (although weaker) being the key themes.

In terms of 'Business Climate', the results are less clear. In a global context, many places offer better circumstances than Oslo when viewed isolated. In other words, the business climate itself might not be a very strong theme, but in combination with 'quality of life' and 'governance', the brand narrative and the brand promise becomes one of a place where employees and entrepreneurs both can lead very good lives, within a stable society that allow for less risky investments. In terms of the enhancement of both the performance and the perception of the business climate, the continuous combination with the 'Quality of Life' and the 'Governance' themes appears to be a very wise strategy.

For the relatively weak 'Hospitality' theme, the results of the survey points towards a greater sense of urgency. If the 'Quality of Life', 'Governance' and the 'Business Climate' are intrinsically inter-woven in brand narrative and brand promise as advised in the above, the perception of 'Hospitality' becomes even more important. This is because the combination of those two themes points towards the personal level - the level of the individual and his or her family and friends. If the promise of Oslo is one of a rich life with many possibilities, 'Hospitality' is one of the first aspects in which Oslo and its people are experienced. The moments-of-truth, through which people encounter Oslo and its residents when they're visiting for business or leisure, or when they arrive to study or work, are very important for their general experience (and perception) of Oslo. Although the scores are by no means dramatic, the results of this perception survey generate a strong call to action to enhance Oslo's hospitality. It is an area that demands attention in the years to come.



# 8. The Oslo Benchmark Study

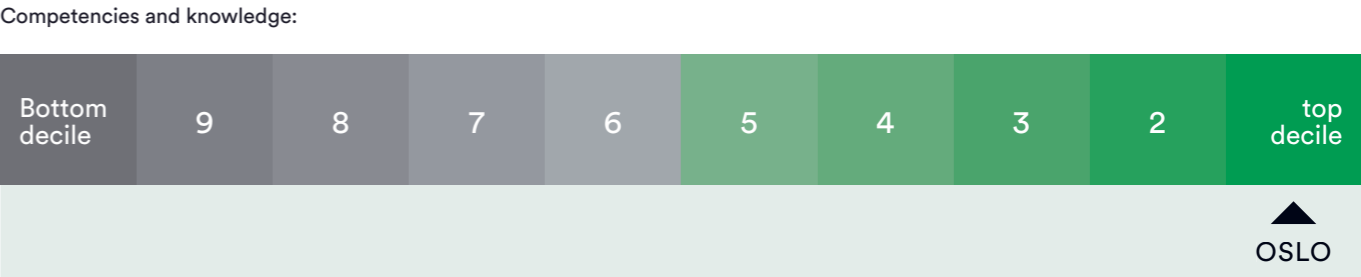
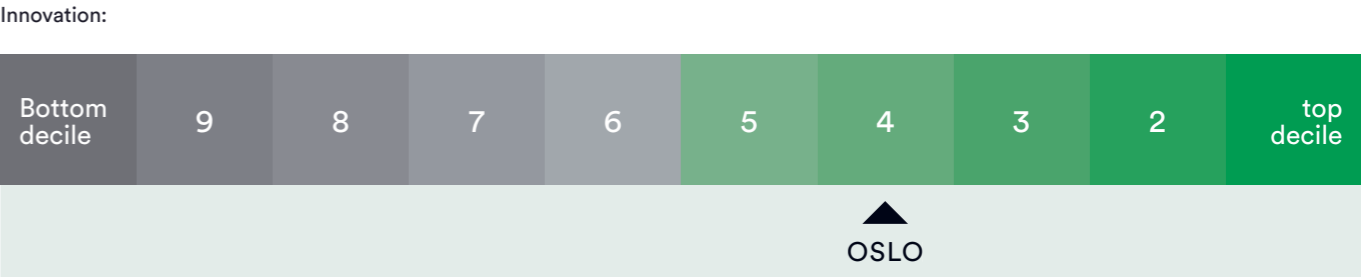
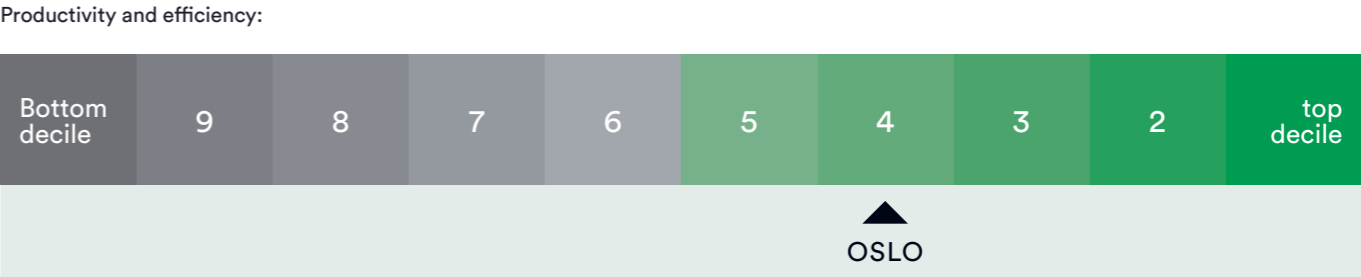
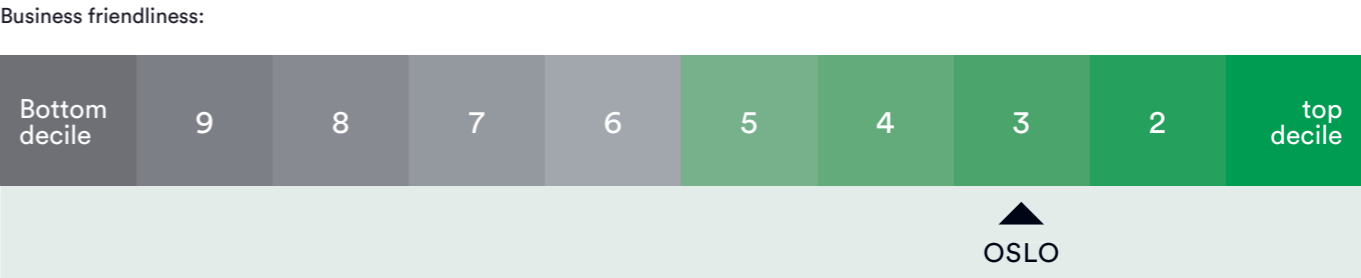
The Business of Cities Ltd led by Greg Clark has conducted an international benchmark study (Clark & Moonen, 2015), looking at Oslo’s performance in on over 50 international indexes and benchmarks in which Oslo appears<sup>51</sup>. Oslo’s rank in these indexes and benchmarks is indicative of Oslo’s performance within areas that are important for Oslo’s international attractiveness and position.

The report points to the number of indexes where Oslo appears as an important fact in itself. Oslo only appears in half as many benchmarks as for instance Stockholm or Copenhagen. Oslo is currently the 53rd most measured city in international benchmarks, by number of index appearances, despite the science of city measurement being heavily oriented to European cities and high quality of life cities. By contrast, Stockholm is the 12th most frequently measured city and Copenhagen is 29<sup>th</sup>. Oslo’s visibility in this area of urban knowledge is only on a par with Dubai, Budapest and Nairobi.

In the report, Oslo’s rank in the 50 benchmarks and indexes where the city appears is grouped in 15 categories related to four overarching themes.

## 8.1. Business

Below are the conclusions about Oslo’s performance for the four categories within the theme of business.

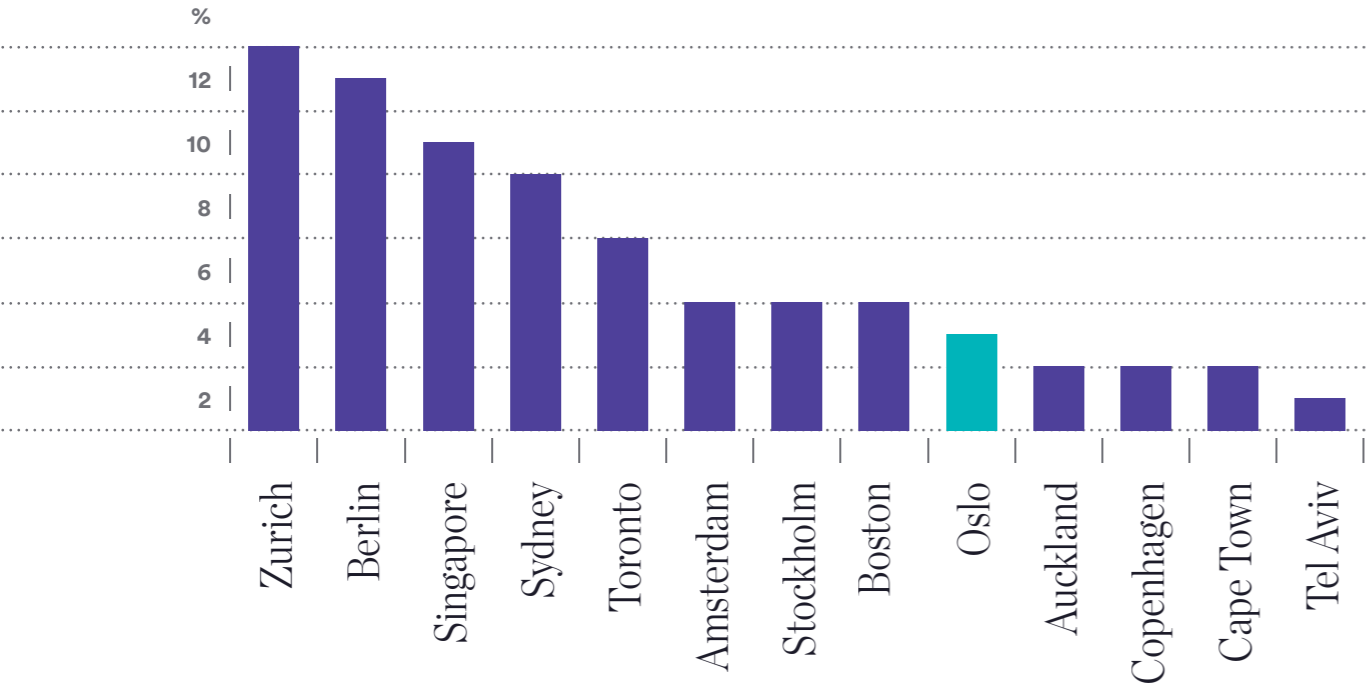


<sup>51</sup> See the entire report here: <http://www.projectosloregion.no/wp-content/uploads/2015/01/Outside-In-View-of-Oslo-Oslo-in-International-City-Benchmarks-Final-Greg-Clark-Tim-Moonen-2015.pdf>

Overall, Oslo ranks well within this theme, but has potential for improvement, particularly in terms of productivity and efficiency, and innovation. Oslo's economic success has occurred despite its economy not being as globalised as some of its peers. Among the leading 25 high quality of life cities, Oslo is only the 19th most globalised. Like other high quality of life cities, Oslo possesses a diverse economic base of established internationally-facing firms, and thriving small and medium enterprises. However, Oslo is distinctive in having a much smaller manufacturing sector, and instead large and rapidly growing finance,

trade and ICT sectors. The background data shows that Oslo's business friendliness is gradually improving. Historically, the city was not widely regarded by European executives as highly attractive for business. Oslo's improved position as a business centre is partly linked to its growing supply of financial services. Nevertheless, based on a recent survey of international audiences, the city is still less likely to be recognised as a place to do business than Stockholm, Zurich or Boston, as can be seen in figure 8.

Figure 8: % of global citizens that identify city as a place to do business, IPSOS MORI 2013



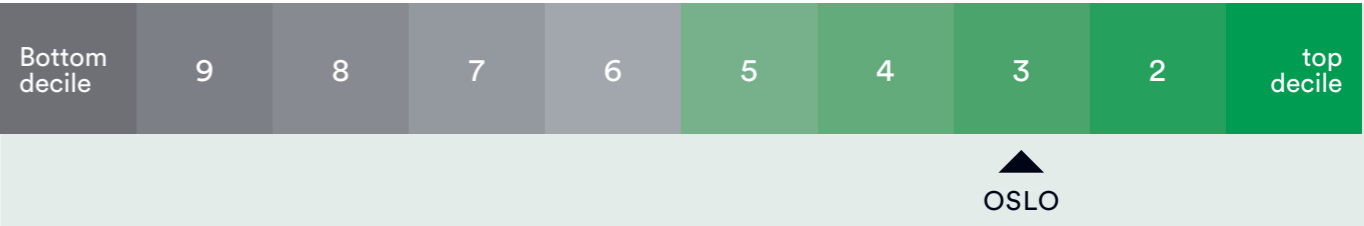
8.2. Quality of life

Below are the conclusions about Oslo's performance for the four categories within the theme quality of life.

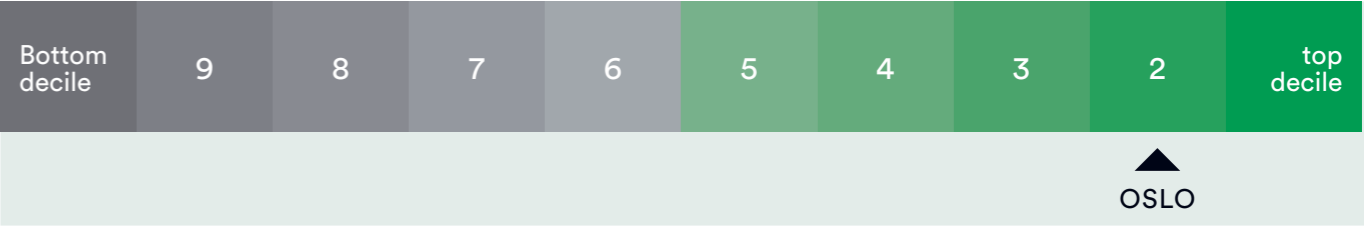
Leisure and recreation



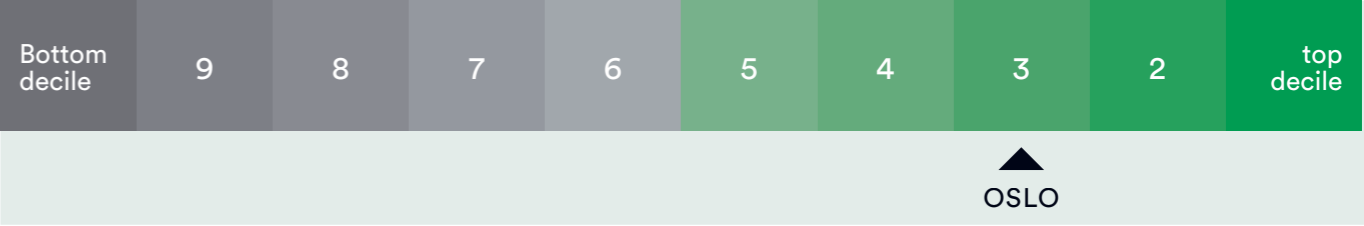
Personal safety



Sustainability and resilience



Work-life balance



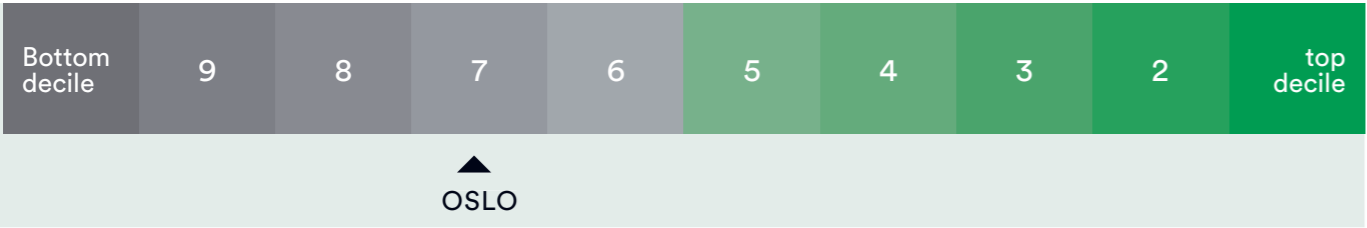
Oslo has a high rank within this theme, albeit not at the very top. Leisure and recreation is an exception, ranking comparatively lowly in the sixth decile. Oslo is one of just five of European cities that satisfy more than 90% of its own citizens with both the cultural facilities and the green space available. However, international assessments identify culture as an area of improvement for Oslo.

Overall satisfaction for citizens living in Oslo is among the five highest cities in Europe, comparable to Hamburg, Copenhagen and Zurich. Externally, Oslo is much more strongly regarded as a desirable place to live, rather than to visit or do business.

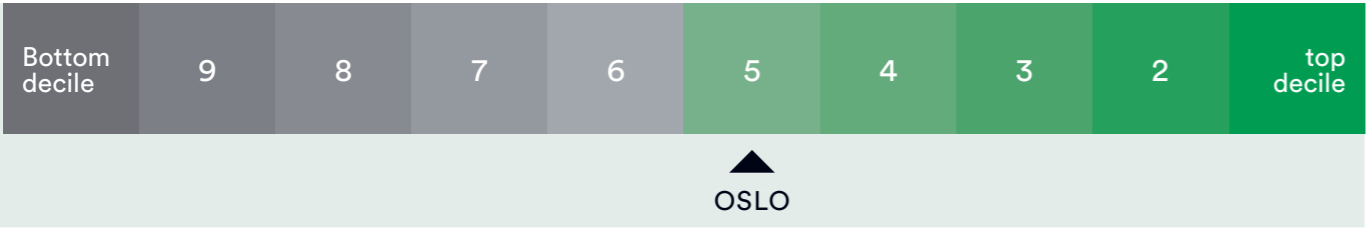
8.3. Hospitality

Below are the conclusions about Oslo’s performance for the three categories within the theme hospitality.

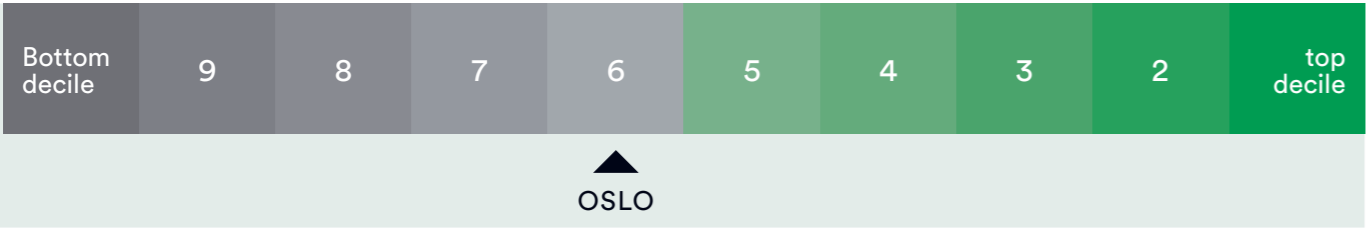
Attractiveness to visitors (attractions, landmarks, shopping, food, events)



Attractiveness for international talent (good universities, interesting companies, expat-scene)



Welcoming to foreigners (ease to move and live here, helpfulness)



Oslo’s rank within hospitality is mediocre. The lowest score is for attractiveness to visitors, but neither attractiveness for international talent or welcoming to foreigners has an impressive score.

Oslo’s capacity to attract visitors is partly limited by its location and climate. Benchmarks that assess the comfort of climate in cities by temperature rate Oslo poorly – in 2014 the city placed last of 24 world cities for climate comfort. Similarly, Oslo’s attraction to

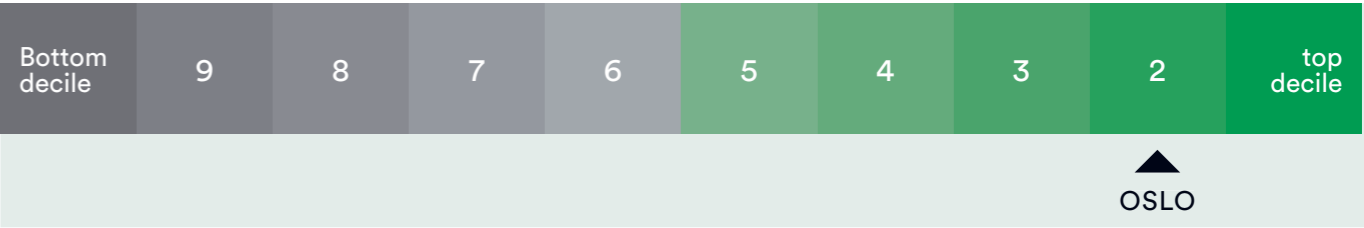
conference attendees and organisers is still behind many other European high quality of life cities. Oslo is, however, attracting more attention in the international press for its cultural appeal than it has done previously.

Despite Oslo’s outstanding educational attainment, its universities do not have a strong international profile, which influences the rank for talent attractiveness.

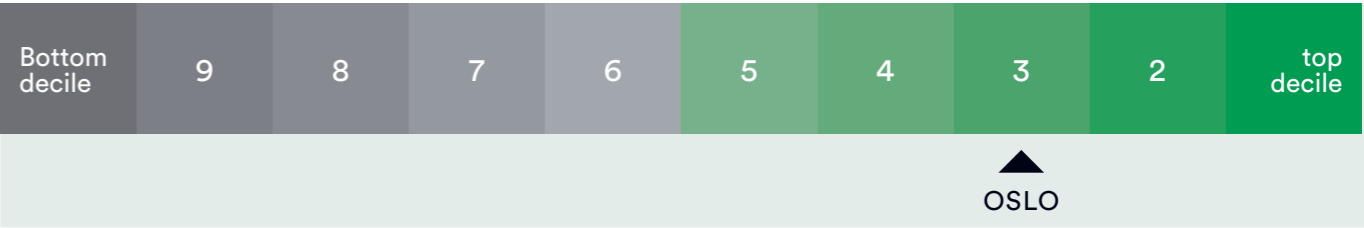
8.4. Governance

Below are the conclusions regarding Oslo’s performance for the four categories within the theme of governance.

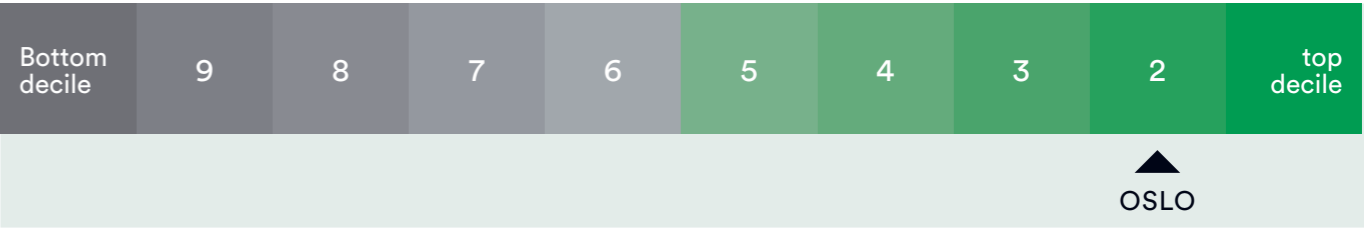
Societal stability



Quality and integrity



Transparency and reliability



Influence and status



Oslo’s rankings within the theme of governance are strong. Its urban model is becoming admired by global audiences, even if this does not yet translate into a volume of international traffic. The notable exception is influence and status, where Oslo’s score is in the middle of the scale. Oslo’s reputation and presence on the world stage as a political force does not reflect its strong assets. Despite

its prominent role in international diplomacy, Oslo does not feature on AT Kearney’s more comprehensive political engagement measure in its Global Cities Index.

8.5. Main findings

The benchmark study supports the view that Oslo is among the most liveable cities in the world. By global standards, it has been a highly prosperous and successful trading city for some time, and has evolved significantly in recent business cycles. Today, Norway’s capital is ranked the 79th most globalised urban economy. It is intensifying its international networks and also maintaining its established strengths in infrastructure, knowledge, smartness and sustainability.

The world clearly admires Oslo for its quality of life, government and stability, but many appear reluctant to participate directly in Oslo’s success. In 2014, Oslo’s international projection and outreach is rated only 50th of 135 world cities, by far its weakest measure across all assessments of leadership and governance. The IESE Business School notes that Oslo is one of a group of cities – including Seoul, Chicago and Osaka - whose international reputation is not as strong as its local assets. This implies that Oslo still has work to do to improve its global appeal and visibility.

Figure 9 Oslo’s current international performance and perception spidergram (as of January 2015)\*



<sup>49</sup> See the full report here: [http://www.projectosloregion.no/wp-content/uploads/2015/02/Inside-Out-Analysis-FINAL\\_DRAFT\\_SINGLEPAGE.pdf](http://www.projectosloregion.no/wp-content/uploads/2015/02/Inside-Out-Analysis-FINAL_DRAFT_SINGLEPAGE.pdf)

<sup>50</sup> The survey was conducted as an invitation-only online survey, and the invitation was distributed to 13,666 relations. 4,326 contacts opened the invitation (32.4% of 13,666) and of these 639 completed the survey (14.77% of 4,326). A response rate of 14.77% is an average performance for such a survey.

The overall picture is that the city’s outstanding education and knowledge only partially convert into a productive innovation platform. In addition, the trust and esteem in which Oslo is held for its social model, diplomatic status and sustainability efforts do not yet translate into a city that is highly attractive or sought after for a wide range of international travellers and workers. In many areas, Oslo only performs averagely among established and higher-income cities worldwide. For a capital of such wealth and assets, these constitute real areas of under-performance that need to be addressed.

8.6. What the media says about Oslo

Over the past five years, Oslo has featured in the international print and online media, often in travel sections but also business and culture segments. The overriding sense is of a city perceived to be in gradual transition. Its enduring strengths – civility, prosperity, high quality of services - tend to be consistently well highlighted. Its opera house and artistic transformation are widely commented upon, as are its attempts to rejuvenate its waterfront and become more globally connected.

The efforts at creating a ‘new’ Oslo are often described in global media as if they are in their early stages, rather than fully realised. They are rarely mentioned without being compared to the traditional Oslo, seen as small, calm, slow, introspective and even boring. Although Oslo’s expensiveness is marginally less prominent compared to five years ago, it is still a major area of comment and concern for international observers.

Although the media conversation about Oslo is increasingly dynamic, there is currently little media visibility of Oslo’s diversifying economy, entrepreneurialism, innovation and sustainability achievements. The global media still focuses principally on Oslo as a short-break destination, as a location for the arts, and as a gateway to Norway’s natural wonders, rather than for its business advantages or a broader set of opportunities.

8.6.1. MEDIA COMMENT TIMELINE: 2009-2014

2009

Christopher Hume, *Toronto Globe and Mail, Canada* <sup>52</sup>

“Here it is, an urban centre that has everything you want in a city – and less...Oslo today is still adapting to its new role as one of the richest cities in the world...it remains a rather modest, even self-effacing, community...The streets are clean, the buildings well maintained, the people well turned-out, though with a studied casualness...Public transit is quick and efficient, especially the train that runs downtown from the international airport...Mostly, things are practical, designed to fit in, not stand out. Oslo’s grandest buildings date from the 19th century, a more opulent age.”

Andrea Shufflebotham, *The Guardian* <sup>53</sup>

“Now Norway’s capital city is proving that its citizens can contribute to the city’s green credentials, without even realising it.”

Stuart Emmrich, *The New York Times* <sup>54</sup>

“THE first thing anyone who knows Oslo says when you mention that you are headed there is, “It’s really expensive.” The second thing they say is, “No, I’m not kidding. It’s really expensive.” And, indeed, a visit to Oslo brings with it immediate sticker shock: a bottle of water costs the equivalent of \$6, a small glass of beer will set you back \$10 or more, and a bottle of wine at dinner can practically equal a month’s mortgage payment back home. But you quickly, if grudgingly, accept the damage done to your wallet after a few hours strolling around this beguiling city – particularly in summer, when the sun’s last rays still haven’t faded by 11 p.m. and the locals, unshackled from the oppressiveness of the Scandinavian winter, seem to be in a nonstop party mode.”

2010

Die Zeit, *Germany* <sup>55</sup>

“When the writer was a child, Oslo was grey, marked by industry and shipping. Today it has been made to be opened to the sea, like Hamburg.”

Olaf Furniss, *The Guardian, UK* <sup>56</sup>

“Norway’s music scene has come a long way since the days of a-ha. Oslo is heaving with quirky venues, independent record shops and festivals”

“Norway’s ruling party celebrated its election victory in a rock venue; more than 20% of the population attends a music festival every year; and it’s not unusual to find gigs taking place in a mausoleum. Oslo is the music-mad capital of this music-mad nation, and the city’s modest population of 550,000 sustains numerous venues, outstanding record shops and countless festivals.

“Before the late 90s there were few places catering for the left-field sounds in which Norway now specialises...There are more than 20 music venues in Oslo now – nine years ago there were four.”

<sup>52</sup> [www.thestar.com/news/insight/2009/08/29/oslos\\_reinvention\\_as\\_a\\_chic\\_waterfront\\_town\\_leaves\\_toronto\\_in\\_the\\_dust.html](http://www.thestar.com/news/insight/2009/08/29/oslos_reinvention_as_a_chic_waterfront_town_leaves_toronto_in_the_dust.html)

<sup>53</sup> [www.theguardian.com/environment/blog/2009/jan/27/biomethane-energy](http://www.theguardian.com/environment/blog/2009/jan/27/biomethane-energy)

<sup>54</sup> [www.nytimes.com/2009/08/23/travel/23hour.html?pagewanted=all](http://www.nytimes.com/2009/08/23/travel/23hour.html?pagewanted=all)

<sup>55</sup> [www.zeit.de/reisen/2010-10/oslo-damhaug](http://www.zeit.de/reisen/2010-10/oslo-damhaug)

<sup>56</sup> [www.theguardian.com/travel/2010/jan/30/oslo-norway-music-festivals-gigs](http://www.theguardian.com/travel/2010/jan/30/oslo-norway-music-festivals-gigs)

2011

The Sunday Times, UK <sup>57</sup>

“You needn’t venture all the way to the western fjords for a glimpse of Norway’s epic natural wonders. Oslo has one on its doorstep – Oslofjord.”

Steven Erlanger, The New York Times <sup>58</sup>

“This is one of the most placid and pleasant capitals of Europe, but Oslo is a divided city. The west of the city is rich, safe and predominantly white; the east, poorer, less safe and populated by immigrants, many of them Muslim.”

Julia Brookes, The Times, UK <sup>59</sup>

“It’s not the weather: temperatures slide from about 8C this month to around freezing in December, but with the right coat and boots it’s perfectly bearable. What’s hard to stomach are the prices. Oslo regularly hits the headlines as the most expensive city in the world: labour costs are high, VAT is 25 per cent and the tax on alcohol is 100 per cent.”

2012

South China Morning Post, Hong Kong <sup>60</sup>

“This is not the first time the artist’s [Munch] legacy has been mistreated. Oslo demolished the home he left to the city in his will and turned part of the land into a car park in 1960. In Norway, it sometimes seems the only ones who really covet Munch are thieves.”

Simon Reid-Henry, Intelligent Life Magazine, Economist <sup>61</sup>

“Small as it is, Oslo is not a city you can get to know in less than a year, as the profound changes in the seasons keep forcing it to reinvent itself...Tucked away in the corner of Europe, Oslo with its thick winter jacket on seems far from the cultural and intellectual pulse, but again you would be surprised.

As a city to live in, Oslo has two competing traits. In part it is entrepreneurial and

vibrant, particularly in its eastern, immigrant quarter. At the same time it is the quintessential urban expression of the square-formed social democratic 1970s: a city that thinks it knows better than you which way is North...Oslo can sometimes feel removed from the rest of the world. Yet really it is not.”

Gaby Wood, The New York Times <sup>62</sup>

“Meet Oslo: a city with a long-held inferiority complex.”

J.S. Marcus, The Wall Street Journal <sup>63</sup>

“Oslo is an outdoor-sports paradise. But judging by the pulse of the city’s real-estate market, it’s the indoor sport of house hunting that has locals breathless....’Oslo has been in a transformation. It’s gone from being introverted to becoming a new kind of cosmopolitan, extroverted city.”

2013

David Fergar, El Pais, Spain <sup>64</sup>

“Oslo is a small town, and small are its nightlife choices compared to other major European capitals. But it’s more than enough to enjoy the hours between vor-spiel and Nachspiel.”

The Economist <sup>65</sup>

“Oil may have filled its coffers and reconfigured its political economy, but it has not changed its culture. Oslo is singularly free from the soaring skyscrapers and bling-filled shopping malls that sprout in other oil capitals.”

Jo Nesbo, Daily Telegraph, UK <sup>66</sup>

“It has all the things that you associate with a capital city, such as art galleries, fine architecture and good restaurants. But at the same time, it has a village quality...Until the Eighties Oslo was a rather boring town, but it’s changed a lot, and is now much more cosmopolitan.”

Claire Wrathall, Financial Times <sup>67</sup>

“Oslo is full of surprises and unlikely juxtapositions, none more extraordinary somehow than that a once-grim industrial enclave should now have at its heart a beach you can actually bathe from.”

Marie Godfrain, Le Monde, France <sup>68</sup>

“Once thought of as austere and sleepy, the Norwegian capital is gearing itself towards contemporary design and architecture. The majestic opera in Bjorvika harbour, the Astrup Fearnley museum on the docks, cutting-edge interior design and Scandinavian flavours are all worth discovering.”

Ingrid K Williams, The New York Times <sup>69</sup>

“Has Oslo priced even itself out of the city? These days, the most appealing areas in the famously expensive Norwegian capital lie on the periphery of the city center, in its newly trendy neighborhoods...and beyond, in the glorious landscapes of the Oslo Fjord and the sprawling northern forests...Today, to properly explore Oslo’s finest attractions, expect to wander widely.”

Zeke Turner, The Wall Street Journal <sup>70</sup>

“Is Oslo the Next Art Capital? A combination of unrivaled government funding and wholesome creative energy has transformed this formerly hardscrabble Norwegian city into one of the most electrifying places to see new art.”

The Economist <sup>71</sup>

“Judging by its pristine streets, healthy-looking people and chic boutiques, Oslo seems confidently prosperous.”

Paul Cleary, The Australian <sup>72</sup>

“A sleek new Opera House on the Oslo waterfront is another example of the way the country is investing in the arts in order to make itself a more attractive destination.”

Jerome Porier, Le Monde <sup>73</sup>

“On the other hand, the five Nordic capitals are the priciest capitals in the world. Oslo is the most expensive, followed by Copenhagen, Stockholm and Helsinki.”

2014

Francesca Perry and Chris Michael, The Guardian, UK

“Akash Sampat at Saffron Brand Consultants responds: ‘...Oslo does not rank very highly in any of the rankings we used to select our cities, but was included because it’s a city that positions itself on business and the environment, unlike other cities.’”the Astrup Fearnley museum on the docks, cutting-edge interior design and Scandinavian flavours are all worth discovering.”

El Pais, Spain

“Oslo’s growth brings an unexpected cosmopolitanism in a city of its size, which has resulted in spectacular urban developments.”

Joanna O’Connor, The Guardian, UK <sup>74</sup>

“It’s been said that when a man is tired of Oslo he’s probably been there for three days. While it’s true the Norwegian capital lacks some of the carefree charm of its Scandinavian neighbours, there are pockets of cool if you know where to look.”

Lonely Planet <sup>75</sup>

“Norway’s capital is an easy-going city with an eclectic architectural mix of old, new and just plain 1960s that is hard not to like. The perfect size for exploring on foot, the city boasts world-class museums, a lively nightlife and plenty of outdoor activities for the energetic...Oslo is certainly the cosmopolitan heart of Norway.”

Andrew Stone, The Daily Telegraph, UK <sup>76</sup>

“Norway’s cities are hardly its greatest draws and arguably one of Oslo’s greatest attractions is its proximity to yet more ruggedly beautiful wilderness. In the morning you can tour Oslo’s museums and in the afternoon be deep into the trails through mountainous forests, or board a boat for the local fjord.”

Luisa Valle, Oglobo, Brazil <sup>77</sup>

“The Norwegian capital is a city that breathes an interior air. On the streets, there is none of the frantic running that is seen in other capitals around the world. Just agitated tourists eager to explore every corner of a city walking at their own pace.”

<sup>57</sup> www.thesundaytimes.co.uk/sto/travel/weekends/city\_breaks/article664180.ece

<sup>58</sup> http://www.nytimes.com/2011/01/26/world/europe/26norway.html

<sup>59</sup> www.thetimes.co.uk/tto/travel/article3192573.ece

<sup>60</sup> www.scmp.com/news/world/article/1116027/squabbles-delay-new-edvard-munch-museum-oslo

<sup>61</sup> http://moreintelligentlife.com/content/places/oslo-takes-a-year?page=full

<sup>62</sup> www.nytimes.com/2012/05/17/t-magazine/oslo-northern-lights.html?pagewanted=1

<sup>63</sup> http://online.wsj.com/articles/SB10001424052970204349404578103034042608720

<sup>64</sup> http://elviajero.elpais.com/elviajero/2013/04/26/actualidad/1366984968\_724461.html

<sup>65</sup> http://www.economist.com/news/special-report/21570842-oil-makes-norway-different-rest-region-only-up-point-rich

<sup>66</sup> www.telegraph.co.uk/travel/destinations/europe/norway/9903140/Jo-Nesbos-Oslo-Norway-my-kind-of-town.html

<sup>67</sup> www.ft.com/cms/s/2/9cd2fcd0-9216-11e2-851f-00144feabd0.html#axzz3LITibakj

<sup>68</sup> www.lemonde.fr/web/recherche\_breve/113-0,37-1228824,0.html?xtmc=oslo&xtcr=233

<sup>69</sup> www.nytimes.com/2013/06/16/travel/36-hours-in-oslo.html?\_r=0

<sup>70</sup> http://online.wsj.com/articles/SB1000142412788732346980457852562793725892

<sup>71</sup> www.economist.com/news/europe/21584372-once-loved-norways-prime-minister-now-faces-defeat-resurgent-right

<sup>72</sup> www.theaustralian.com.au/arts/scream-at-the-centre-of-a-culture/story-e6frg8n6-1226731795778

<sup>73</sup> http://www.lemonde.fr/argent/article/2013/12/23/paris-est-l-une-des-villes-les-plus-cheres-du-monde\_4339172\_1657007.html

<sup>74</sup> www.theguardian.com/travel/2014/jul/13/travel-tips-oslo-devon-ibiza-joanne-oconnor

<sup>75</sup> www.lonelyplanet.com/norway/oslo

<sup>76</sup> www.telegraph.co.uk/travel/destination/norway/130065/Norway-travel-guide.html

<sup>77</sup> http://oglobo.globo.com/estilo/boa-viagem/capital-da-noruega-cidade-onde-nobel-da-paz-entregue-oslo-respira-um-ar-tranquilo-de-interior-14448571

# 9. Conclusions

In this chapter, we will take a closer look at the possible conclusions based on the major trends affecting the Oslo Region, theory, and the experiences of other cities, as well as looking at empirical data collated for this study. Based on this, we will suggest a direction for the Oslo Brand Management Strategy.

## 9.1.Does the Oslo Region need a strengthened brand?

Before going into the specifics of the findings and what choices they suggest, it is important to consider the most basic question: Does the Oslo Region need a strengthened brand?

In spite of continued growth, both Norway and the Oslo Region are entering a period of greater uncertainty, especially as prices of oil and gas in the international market fall. In the longer term, Norway and the Oslo Region will face the challenges of transforming a business sector that is currently heavily dependent on oil and gas as the world looks for more climate friendly energy alternatives (see section 3.2.6), as well as faces the changes brought about by globalisation. How Oslo and Norway adapt and manage these challenges will have a major impact on important quality of life factors.

In order to meet these challenges, the Oslo Region needs to diversify and strengthen its economic base. This rests on Oslo's ability to make use of and retain existing talent and competence, while at the same time attracting such talent in competition with other major cities and regions all over the world. Norway needs to have a global gateway working both ways, and only Oslo can fill that role.

The economic and population growth of Oslo results in a lot of activities, a lot of developments and a lot of buzz. There are many stories to tell, and there are many possibilities to tell them to an audience interested in listening to them. From a place branding perspective, this means that there is a chance to shape and mould the narrative of Oslo by coordinating and filtering the on-brand stories.

It is easy to become complacent when things are going well In the past, many cities have launched place

branding initiatives when they have experienced decline or while major shifts in their economy. In such situations, the sense of urgency is commonplace, but the resources and the possibilities are often more limited, meaning that the number of success stories is limited.

Oslo is a highly desirable place. The Region is in a position where it can take place branding to the next level, and implement and integrate it into the way in which it acts. The coming years are ripe with possibilities to influence the way in which Oslo is perceived, both abroad and at home.

## 9.2. What does a strengthened brand imply?

Unlike many major cities and regions, Oslo has not had a coordinated effort across sectors to support its place brand. Oslo has managed so far without one, largely because of the unique economic position the region has enjoyed.

Oslo is now in a position to draw on the experiences of the cities that have trialled place brand management. One of the most important lessons is that there is no quick fix – it is not a question merely of who has the biggest marketing budgets or the best campaigns.

The place brand strategy forms the core values and the core promise of the place in question, which all product and service development, promotional messages, propositions and experiences should reflect. The perceptions of key decision makers, opinion leaders, expats, tourists and citizens, should match the reality of their experiences with the place. Since place brand management is the basis for more direct activities, and since Oslo has not previously had a place brand management strategy, this is the most

important factor to get in place now. The Oslo brand also needs high quality PR, communication, place promotion and lace marketing. Although the direction of such activities should be informed by the brand strategy, these are also disciplines in their own right, with separate tools. In some cases, such activities are already taking place in the Oslo Region. An important example is Visit Oslo's place based marketing directed at the travel and tourism segment. In other areas, it may be necessary to boost the effort. This strategy does not go into the details about what tools should be used by the different disciplines on behalf of the Oslo brand. This will call for separate strategies and action plans. This strategy does however offer strategic advice on the brand vision, values, promise and position, which we will turn to in the next section.

## 9.3. What are the most important areas for a strategy to address?

As we have documented in previous sections, this strategy is based on several empirical sources. As a guiding principle for #ProjectOsloRegion has been a bottom-up approach in order to develop a strategy which is both relevant and legitimate, these sources are an important basis for many of the important strategic choices in this document. In this section, the input from the involvement process is coupled with the input from the international benchmark study. One of the strategic choices is which areas are the most important to prioritise, and in what ways they are important for the Oslo brand.

Figure 10: Spidergram with comparison of survey and benchmark results



The spidergram above is an illustration of Oslo's overall performance and perception for the 13 categories, which are included in both the perception survey and the benchmark study. The output from the workshops and interviews are largely in line with the results from the stakeholder survey.

There are notable gaps between the survey and benchmark results in certain areas. For some categories, this could indicate a need for marketing efforts, in others this could indicate a need for improving the region's assets or services, while for some cases there could be a need for both; in this situation, the improvement of services and assets should always take priority as marketing a bad product could damage the integrity of the Oslo brand.

The data from the benchmark study and the perception survey suggests that quality of life and governance are the two themes where Oslo's perception largely aligns with Oslo's performance, and at the same time achieves its best score. Themes related to these are also often mentioned as strengths in the workshops and the interviews. This is especially the case for the quality of life categories personal safety, sustainability and resilience and work-life balance, as well as for the governance categories quality and integrity and transparency and reliability.

There are, however, two exceptions within these themes. Leisure and recreation is much better regarded by stakeholders, than it is in the benchmark study. It is likely that the transformations in Oslo which are currently taking place have not yet been discovered by many international observers. A recent survey by Monocle, claims that the number of concerts in Oslo is double that of Stockholm and Copenhagen. This is also an area where the Norway Brand, with strong focus on nature, is not necessarily helping Oslo's more urban profile perception wise. Since perception in any case is reality, we choose to categorise this as mostly a perception issue in this strategy. There is no doubt that Oslo has a lot to offer in this area, also compared to many other cities in Europe, if not on the same level as some of Europe's biggest cities.

The category of international influence and status within the governance theme is also an exception. The gap between stakeholders' own perception in the survey and the benchmark is three points for this category. This could suggest that stakeholders have a more positive view of Oslo's international position than is actually the case, or it could be an expression of a potential that has not yet been realized.

This overview is however not in itself decisive in terms of which areas should have priority in the brand management strategy. The different categories that have been researched are not necessarily equally impor-

tant. It is also important to observe that there are different types of relationships between the categories. Improved strength in performance and perception within one category may help to strengthen the performance and perception of other categories. In the end, what it comes down to is a matter of strategically informed choices. What does the Oslo Region need most to improve, and what can be realistically achieved with the resources that the stakeholders are willing to contribute?

Since investments, business location as well as tourism and travel, will be strategically important areas for the Oslo Region in the years ahead in relation to the need to transform and develop Oslo's and Norway's economic base cf. section 5, it is natural to emphasize the topics related to this theme in the strategy. Success in this area will be decisive in maintaining the high level of quality of life that the Region represents, both through a maintained high level of employment and by generating tax revenue to pay for publically funded services. The positive trend for Oslo within Business attractiveness reveals that Oslo has a potential for a positive development of business attractiveness in the years to come. Financial services is one example from the business sector in Oslo where this potential seems especially strong.

The business sector in Norway needs to rival the most advanced business communities in the world. Competence is a decisive factor. In order for the business sector to succeed, and for Oslo to perform better in this area, the region needs to improve its supply of world-class talent. This can be achieved by being attractive to highly skilled workers from other parts of the world, but also by improving the quality of the higher education system. Since the international flow of talent also greatly affects the quality of higher education institutions, hospitality is very important as it shapes an individual's willingness to return to Oslo. This theme seems at present to be one of the weakest parts of the Oslo brand. Similarly, the category of attractiveness to visitors, which is included in the benchmark study but not the survey, shows a result in the bottom tier. This is the weakest of all the results we have measured. The challenge within this theme has most of all to do with the services, attitudes and legal and practical aspects that influence the choice to live, study or work in the Oslo Region. This is, in other words, primarily a question of performance. Once in place, better services for visitors, students and highly skilled employees may be utilized to improve the Oslo Region's outside perception in terms of both hospitality and business.

The quality of the place, and how this is perceived on a broad range of issues, is key in attracting visitors, students and highly skilled employees. Although individuals may have many different reasons to make the decision of coming to a city or a region, it is now

widely recognized that offerings within culture, leisure and recreation, as well as schools, day care, effective transport systems and personal safety are important. Oslo is an advanced high quality of life region, and both performance and perception indicators support this. The perception of Oslo's offerings within culture, leisure and recreation is, however, in reality a performance problem if it is to attract visitors and highly qualified future residents in the future. This is not only a problem for Oslo, but for Norway in general, according to the Nation Brands Index (see section 6.3). This should be a prioritized ingredient of the brand strategy, focusing largely on getting better recognition for what the Oslo Region can offer within culture, leisure and recreation.

For these reasons, our recommendation is that business attractiveness, hospitality, and culture, leisure and recreation should be the most important areas for the Oslo brand management strategy. Hospitality is mostly about closing a performance gap, while culture, leisure and recreation is mostly about closing a perception gap. Business has to improve both performance and perception.

This does not imply that the other themes and categories are unimportant for Oslo. Preserving a high quality of life, as well as quality and integrity, transparency and reliability in governance, is necessary in order to succeed in improving the Oslo Region's international position. These are, however areas which should remain relative strengths for Oslo in the foreseeable future. One of the reasons for this is that it is intricately linked to the Norway, Scandinavia and

Northern European brands, in which these categories are well established.

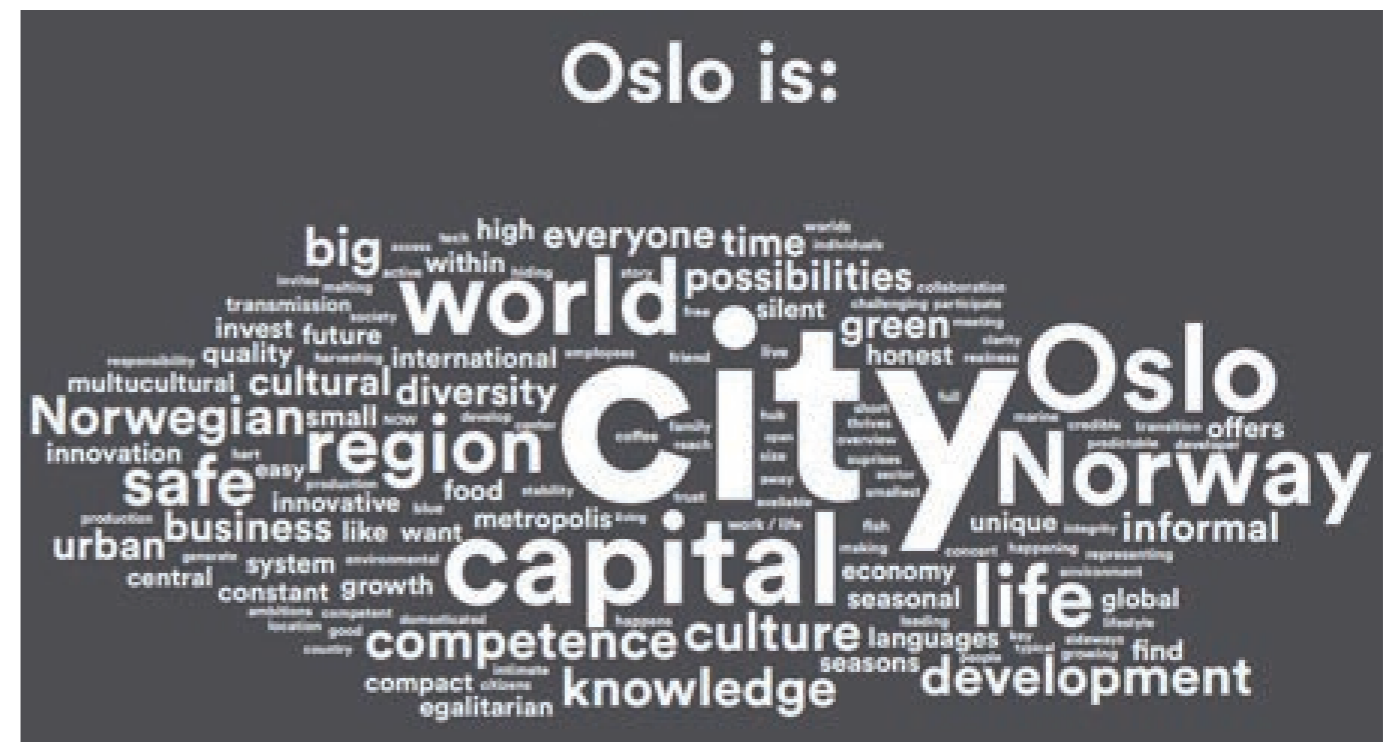
The category of international influence and status is a special case. This is one of the categories where there seems to be a substantial gap between the stakeholders' perception and Oslo's actual performance. This category can both be viewed as a separate area, but is also linked to the other themes within the governance category. This is a category with potential for improved performance.

However, this is not a strategic area that should take special priority. This is because it is less crucial to succeed in this area in order to strengthen the brand as whole. As stated above, it is likely that Oslo's international position and status will gain significantly from the strengthening of Oslo's brand in In other words; the prioritized areas which have been mentioned above will indirectly benefit Oslo's international influence and status.

#### 9.4. What are the Oslo brand values?

Through the involvement of stakeholders, an important goal has been to get a better understanding of the DNA of the Oslo Brand. Since the brand is the place, the values that the stakeholders use to describe the Oslo Region and its qualities, are also the values of the brand. The process has produced a vast numbers of words about the Oslo Region, the most important

Figure 11: The most commons words used to describe Oslo among workshop participants



Based on these words, we have chosen three values that we believe cover the most important values of the brand. These are not values that are explicitly used to describe the Oslo Region, but rather an interpretation of the Oslo brand based on the various sources and inputs. These are:

- Real
- Pioneering
- Enriching

It is important to emphasize, that these values are not words for a slogan, but important parts of the filter to define on-brand activities for the Oslo brand (see Part I).

### 9.5. Who are the target groups? How are they reached? Who pays?

As discussed at the beginning of part 2, this is a value based strategy for the management of the Oslo brand. In part 1 we showed an example of the narratives that should be developed based on the vision, values, promise and position outlined in this strategy.

This strategy is based on the belief that in order to be successful as a cross-sectorial integrated brand strategy, the implementation must be guided by the knowledge of stakeholders. While the vision, values and what is considered on-brand or off-brand must be shared, the actions must be adjusted to the stakeholders' needs and the target groups they need to reach.

Essentially, this is a bottom-up approach. There are several reasons for this:

- **Marketing resources:** Unlike commercial brands, the physical and financial resources available for a place brand are limited. Marketing efforts must be targeted towards specific groups in order to be effective.
- **Scale and complexity:** The Oslo Region has almost 115,000 companies, more than 70 business networks and clusters, 78 municipalities, 4 counties and over 30 higher education institutions. It is not possible for one organisation to handle the direct communication to so many different target groups.
- **Shifting targets:** The target groups that stakeholders need to reach change over time. Only the stakeholders themselves will have the capacity for monitoring these changes.

The implementation of an integrated brand management strategy must be organized in a way that allows for the different stakeholders and groups of stakeholders to share in the benefits of a coordinated effort. Synergies are created through a common on-brand/off-brand filter, shared values and narratives. At the same time, communication should be relevant for their individual needs.

As a result, the organizing principles must be long-term and shared, and therefore arranged in an organisation that is responsible for top-level brand management. These are the back office-services. One example is Marketing Birmingham <sup>78</sup>, which provides facts about the region, persuasive case studies, images and more, to help stakeholders build their own messages. Since these services represent a common good, it is natural to assume that this will need a higher percentage of public funding.

Governance initiatives directed at improving services that are directly linked to the Oslo Region's attractiveness, as well as the monitoring of performance of such services, is another example of responsibilities that could be taken care of at a top level.

Other services must be short-term and targeted towards specific segments of target groups. With the current division of labour between Visit Oslo, Oslo Business Region and the Oslo Region Alliance, responsibility could be left to one or more of these organisations depending on the nature of this activity, and the stakeholders and target groups in question. In most cases, this would be a funded through a partnership agreement, with different amounts invested depending on the type of action and stakeholders. Actions should be prioritized in a short-term plan which are agreed by the governing bodies of the organisations in the Oslo Brand Alliance, but based on advice from what we have called the Oslo Brand Leadership Arena. An example of this could be advisory services, offered at commercial rates for stakeholders who can benefit from the accumulated experience and knowledge being applied.

As previously mentioned, it is natural to assume that there should be a difference between services paid for by stakeholders and public funds. For services that are defined as a common good – typically the back-office services – as well as partnership funds within prioritized themes or areas of action, public funds will most likely be important. The financing model for the Stockholm Business Alliance <sup>79</sup>, where 52 municipalities committed to contributing to brand marketing activities over a five year period, (cf. part 2 section 2.3.4) is already used as financing principle for the Oslo Region Alliance. This could help secure regional ownership to the brand management. However, a substantial private funding of such activities should not be ruled out, as the example from Barcelona Global suggests <sup>80</sup> (cf. part 2 section 2.3.2).

## 9.6. Oslo Brand Alliance

During the course of #ProjectOsloRegion, a great number of stakeholders have been involved. The interviews and workshops have given the project an opportunity to test the sense of urgency for a brand management initiative. The response has been very positive. Several stakeholders have responded that it is about time the Oslo Region acts on its ambitions and takes a stronger international position. Many stakeholders have also offered to contribute actively to this effort. The momentum that has been built up, calls for a rapid transition from strategy to implementation.

The three organisations - Visit Oslo, Oslo Business Region and Oslo Region Alliance - already have a mandate to strengthen the Oslo Region's international position and brand. Visit Oslo has extensive experience in working with stakeholders and target groups related to the travel industry. Visit Oslo also has a large network within media and is monitoring

the Oslo Region's 'buzz' and international position within the travel sector. The Oslo Business Region has several projects related to strengthening the Oslo Region's international position; for example, Oslo Innovation Week, participation with Hackney Borough of London, and the South by Southwest festival and exhibition in Austin, Texas. The Oslo Business Region also has a network of international journalist, and has responsibility for monitoring business performance and attractiveness. The Oslo Region Alliance has strengthening the Oslo Region's international position as one of its main objective, and, among other projects, works with business clusters like OMA to promote the Oslo Region internationally.

Creating anew organisation would take a significant period of time to achieve. For this reason, the proposal in this strategy is to create an operative entity on the basis of cooperation between the three existing organisations. We have chosen to call this cooperation the Oslo Brand Alliance.

Figure 12: Oslo Brand Alliance



In order to comply with formal prerequisites, secure transparency and accountability, decisions on economic transactions related to Oslo Brand Alliance will be resolved as one of the first steps. Together, these three organisations cover the main areas for brand management activities, including travel, business and hospitality services. In this model, they will be responsible for the permanent functions in terms of intelligence, competence and training, network arenas, and the open source toolbox described in section 9.5, as well as strategic projects. It is however essential that the brand alliance

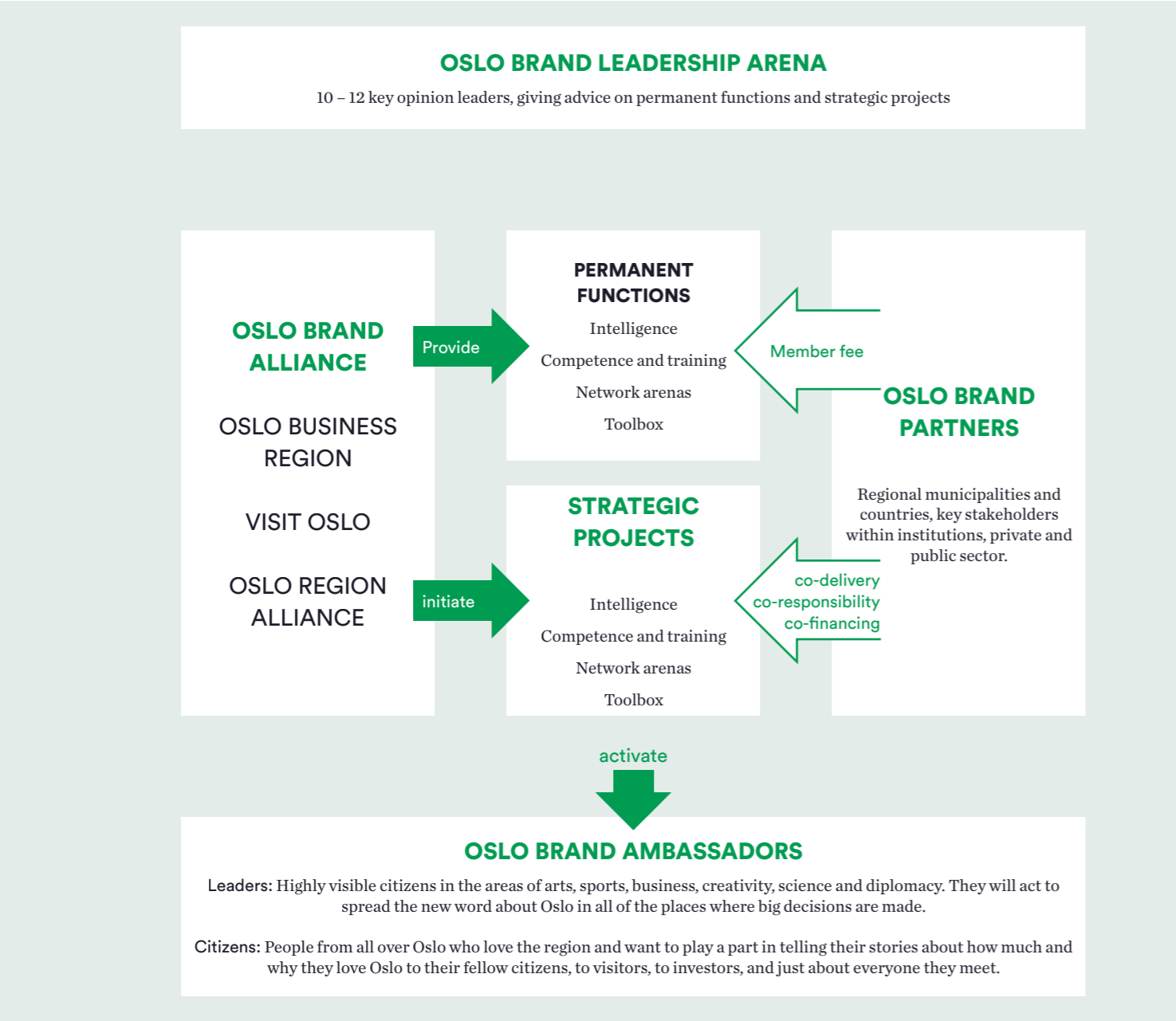
continues to cooperate closely with stakeholders, particularly the second tier stakeholders such as the city of Oslo, county councils, universities, Oslo Airport, Innovation Norway and major business networks and clusters.

<sup>78</sup> See <http://birminghamtoolkit.com>

<sup>79</sup> <http://www.stockholmbusinessregion.se/sv/Natverk--Moten/Natverk/Stockholm-Business-Alliance>

<sup>80</sup> <http://www.barcelonaglobal.com>

Figure 13: Oslo brand management structure



In addition to the Oslo Brand Alliance, which is the operative branch of the management structure, there are three additional bodies. The Oslo Brand Leadership Arena consists of key opinion leaders from the Oslo Region, the city of Oslo, important companies and public institutions. Their main responsibility is to give strategic advice on the priorities, direction and development of the management of the Oslo brand. This body could also serve as catalyst for forging stronger cooperation in the Oslo Region among

key players.

The Oslo brand partners consist of two groups. Firstly, there are the municipalities and counties that form the Oslo Region Alliance. This should however be voluntary decision to participate. Secondly, there are private and public organisations that are willing to contribute to the long-term strengthening of the Oslo brand through a fixed fee. The partners will also be invited to join or propose projects, which are

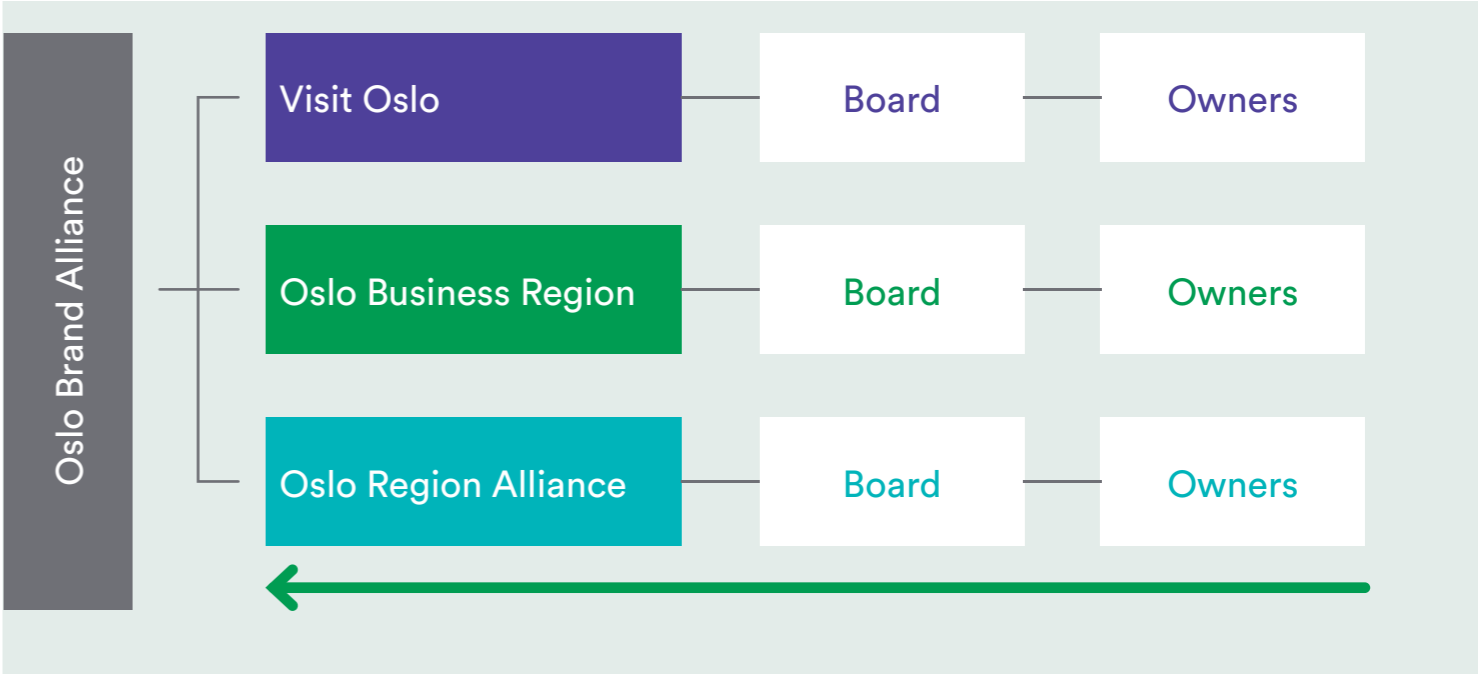
considered based on their adherence to the on-brand requirements.

The Oslo Brand Ambassadors are individuals that are willing to promote the Oslo Brand internationally and the brand alliance domestically. This can both be highly visible leaders and ordinary citizens that want to associate themselves with the promotion of the Oslo brand. This is important for the communication of the brand and for the recruitment of stakeholders to join the coordinated brand initiative. In our opinion, the Oslo Brand Alliance should be established at the earliest possible opportunity. The

Brand Alliance should be responsible for the further development of the brand narrative, together with important stakeholders. The brand alliance should also facilitate the process of establishing the Oslo Brand Leadership Arena, recruiting Brand Partners and Brand Ambassadors. This work should start during the second quarter of 2015.

In this model, the three existing organizations retain their decision making structures and areas of responsibility, but pool their resources and cooperate in creating new areas for collaboration about promoting the Oslo brand based on the brand strategy.

Figure 14: Oslo Brand Alliance decision structure



The three existing boards must decide on plans and budgets. For formal reasons, and to ensure accountability, certain shared tasks must be hosted by one of the three organizations. The responsibilities and the division of labour between the three organizations must be formalized thru contracts of agreement, which are approved by the three boards.

Within the alliance, Visit Oslo will still have the responsibility for marketing and promotion of Oslo related to travel and tourism. Oslo Business Region will be responsible for promotion of the Oslo Region as a place to invest, establish business and study. Oslo Region Alliance' task will be to build regional pride,

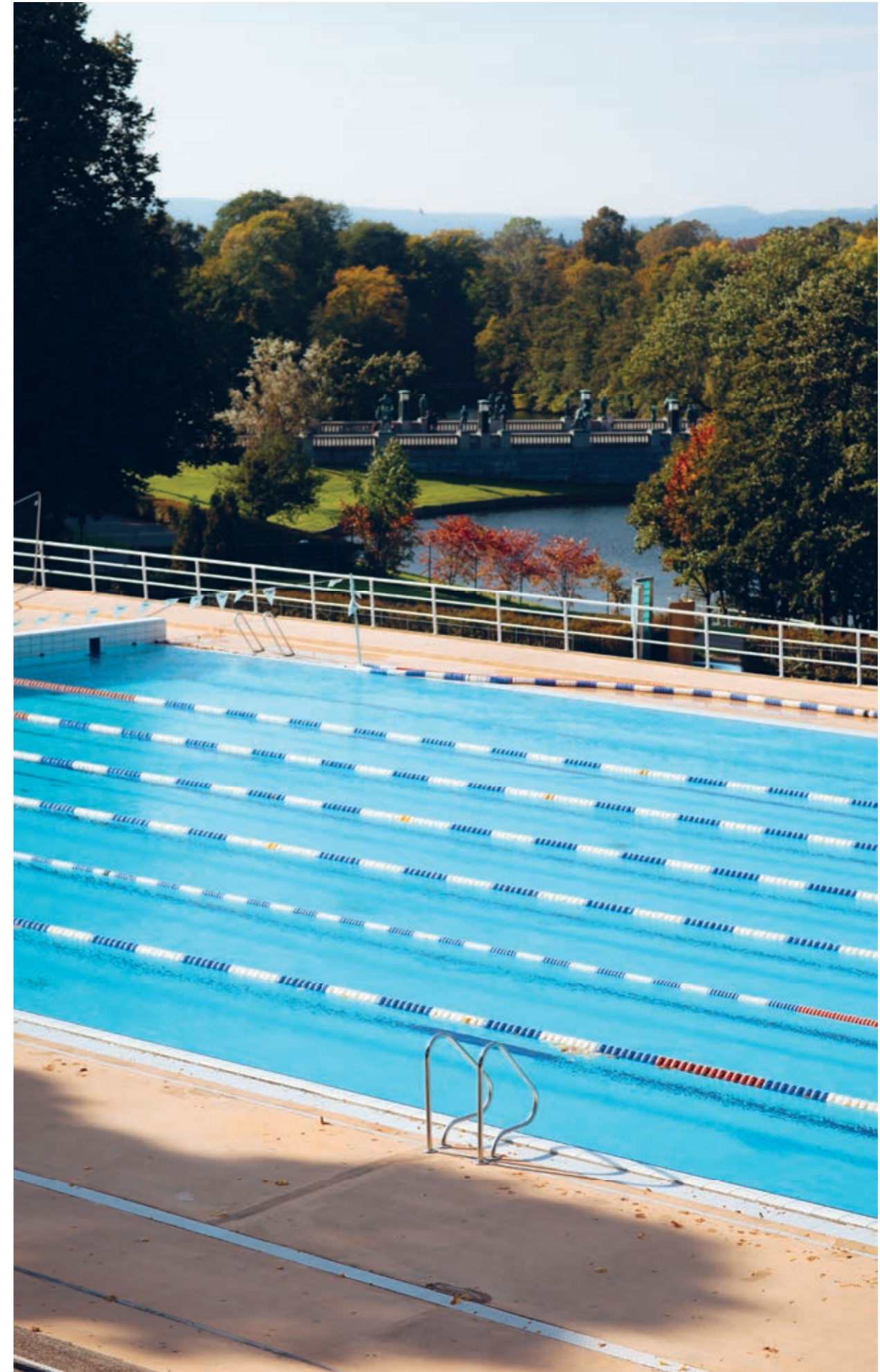
as well as cooperation with regional organizations in business, transport and urban development. The shared responsibilities will include on brand/off brand evaluation of projects, back office functions with brand toolbox, establish "central" for new events to the region, shared intelligence, development and facilitation of stakeholder interface and network arenas and to Initiate/develop profiling activities.

The alliance is not suggested to fund or to exercise everything, but to orchestrate the broad collaboration needed between public and private organisations in the region.

# 10. Let's do it!

As part II of this document has shown, the Oslo Region has:

- Good *reason* to improve its international position through improved brand management. This is necessary in order for Oslo to maintain its global competitiveness within business, and, in the long term, its high quality of life.
- Great *potential* for a stronger international position. The Oslo Region has some of the strongest assets in the world and already performs well.
- The *resources and support* needed to engage in more ambitious brand management. **ProjectOsloRegion** has documented a very positive response to this initiative. Many organisations within the private, public and civil sectors seem to be ready to contribute resources.



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