

THE PLACE BRAND OBSERVER

PLACE BRAND LEADERS YEARBOOK

2026

LOCATIONS, PEOPLE, AND IDEAS SHAPING PLACE BRANDING RIGHT NOW



Cover Story

Flanders

A region choosing
stewardship over scale

32 Places to Watch 2026

Cities, regions and countries
leading through governance,
identity and long-term strategy

People to Watch

Visionaries shaping place
branding across policy,
practice and research

Insights

The state of place
branding research &
practice 2026

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CELEBRATING PLACE BRAND LEADERS

Places today compete, collaborate and communicate on a global stage. Their reputation influences investment decisions, talent attraction, tourism flows and diplomatic relationships. Yet credibility is rarely built through communication alone. It emerges through governance, collaboration and the ability to translate identity into long-term strategy.

The Place Brand Leaders Yearbook, produced annually by The Place Brand Observer, documents this evolving field. It brings together examples of places, people and ideas shaping contemporary place branding – highlighting how cities, regions and countries organise their efforts to strengthen reputation and resilience over time.

Rather than presenting rankings, the yearbook focuses on leadership in practice: how strategies are implemented, how institutions collaborate, and how place identity is translated into tangible outcomes.

The places featured in this edition originate from nominations submitted by members of the TPBO Who's Who network and affiliated expert communities. These practitioners, researchers and advisors were invited

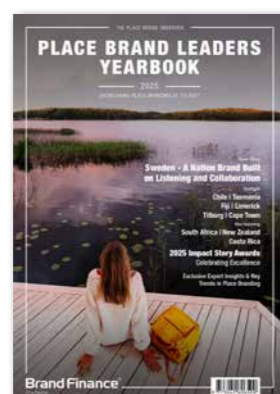
to highlight places they consider noteworthy for their approach to identity, governance, sustainability or strategic positioning. The result is a diverse collection of cities, regions and countries reflecting different models of place leadership across the world.

The yearbook is organised in three main parts. Places to Watch introduces nominated places and explores selected cases in greater depth. People to Watch highlights individuals shaping the field through policy, research and practice. In the final section, expert contributors and partner organisations share perspectives on emerging themes influencing the future of place reputation and strategy.

Together, these sections offer a snapshot of how place branding continues to evolve. Increasingly, reputation is shaped not by campaigns alone but by the systems behind them – governance models, partnerships and long-term commitments that translate identity into action.

The examples gathered in this yearbook reflect that shift, documenting how places are approaching reputation as a strategic asset and a shared responsibility.

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EDITOR'S LETTER

DR FLORIAN KAEFER

Publisher & Editor-in-Chief, The Place Brand Observer

Place branding is entering a new phase. Reputation today is no longer built on narrative ambition alone. It is shaped by governance, responsibility and measurable impact. The places that lead are those that align identity with long-term commitment — not just communication.

This year's edition of the Place Brand Leaders Yearbook reflects that shift.

Place branding has always carried a degree of ambiguity. It sits somewhere between policy, communication and long-term development, often claimed by many but owned by few. What seems to be changing now is not the ambition behind it, but the conditions under which it is practiced. The distance between what places say and what they do is narrowing, not by design, but by necessity.

This shift is particularly visible in how destinations approach tourism and sustainability. This year's cover story on Flanders reflects this clearly. Rather than treating tourism as a question of volume or visibility, the focus turns to stewardship, value creation and long-term balance. Gothenburg, in a different context, demonstrates a similar direction, where sustained commitment to responsible tourism becomes part of how the place is understood internationally.

Beyond these examples, the range of places featured in this edition is deliberately broad. They reflect different geographies, governance models and ambitions. Some are shaping national positioning, others are redefining regions or cities, and some are building identity through specific sectors such as culture, research or public space. This diversity is not incidental. It reflects the reality that place branding does not follow a single model, but adapts to context.

What connects these cases is a more structural shift. Identity is less frequently treated as something to be constructed, and more as something to be recognised and worked with. In several places, this begins with listening, with an effort to understand how a place is experienced by its residents, and how those experiences can be translated into a shared frame of reference. That frame then informs decisions, rather than simply communication.

At the same time, the focus moves from individual assets to systems. The question is no longer only what a place has, but how its institutions, sectors and communities relate to one another. Alignment becomes a form of competitiveness in its own right. Where this alignment is present, places tend to act with greater consistency. Where it is not, even strong assets remain fragmented.

Sustainability runs through many of the cases in this edition, but rarely as a separate theme. It appears instead as a condition shaping how decisions are made, whether in tourism, urban development or economic strategy. In this sense, it is less about signalling intent and more about embedding responsibility into governance.

Another pattern is the way places are understood as part of wider systems. Cross-border regions, networks of cities and sector-based ecosystems appear repeatedly. Reputation is not built in isolation, but through relationships that extend beyond administrative boundaries.

For those working in the field, this makes the practice more demanding, but also more grounded. It requires coordination across institutions, and a willingness to prioritise long-term coherence over short-term visibility. The outcomes are often less immediate, but they tend to be more durable.

This yearbook brings together places, people and ideas that reflect this transition. It does not present a unified model or a definitive direction. What it offers instead is a set of approaches that, taken together, suggest how place branding is evolving. Less as a layer applied to places, and more as part of how they are organised, experienced and sustained over time.

If you would like to share your thoughts, I welcome your feedback at florian@placebrandobserver.com.

BEHIND THIS EDITION

A NOTE ON HOW THIS YEARBOOK CAME TOGETHER



The Place Brand Leaders Yearbook is produced by Dr Florian Kaefer, founder of The Place Brand Observer, together with a small international editorial team spread across several time zones.

This edition was coordinated by Nafisa M. Sharfi, who led the process from first outreach to nominated places through to final production — holding together the many moving parts that a publication like this requires.

Saskia Ruttkowski contributed to editorial development, bringing particular focus to the cover story on Flanders and to weaving sustainability perspectives consistently throughout the edition.

Layout and design were developed in collaboration with IdeaWorks (India), with Divyangani Sharma leading visual production and Shyam Vasudevan serving as partner contact. Their work translates a year's worth of research, nominations and conversations into the pages you are reading now.

The places, people and ideas featured here reflect nominations and perspectives from the wider TPBO expert community, whose input shapes the direction

of the yearbook each year. It is, in many ways, a collective effort — one that depends on the generosity of practitioners, researchers and place leaders willing to share their work and thinking.

The Place Brand Leaders Yearbook 2026 is developed in collaboration with TPBO's agency and industry partners, and is supported by Brand Finance — the edition's Title Partner — whose work on nation brand valuation and global soft power analysis features in the Insights section.

The yearbook series is available for free download at placebrandobserver.com/publications and is deposited with the Swiss National Library as part of the permanent public record.

Editorial enquiries: editor@placebrandobserver.com

Interested in collaborating?
Contact the team.

GREETINGS

VOICES FROM THE GLOBAL PLACE BRANDING COMMUNITY



Leen Gysen
CEO
VisitFlanders

I am proud to welcome you to Flanders through this beautiful TPBO Yearbook.

It is not the first time Flanders has found its way into a distinguished publication. Julius Caesar already wrote about our region in the Bello Gallico. Albrecht Dürer published a journal of his journey through the Low Countries. And in his travel writings, Victor Hugo expressed great admiration for Flemish architecture.

That architecture can still be admired today, whether you visit Flanders as a traveller or as the organiser of a conference. Many historic heritage sites now house state-of-the-art conference venues. They offer you the opportunity to welcome your delegates in a truly memorable, sustainable and accessible setting.

Flanders has been welcoming visitors from all over the world for centuries. That is thanks to its easy accessibility at the crossroads of Europe, its rich historic cities, its art and avant-garde creativity, its culinary experiences, and, last but not least, its welcoming people.

Flanders continues to build on this strong foundation with a clear focus on innovation and sustainability. Across our region, heritage and progress go hand in hand, creating places where new ideas can thrive in a setting shaped by history and culture.

This is also what makes Flanders such a relevant feature in this Yearbook. It is a region that looks ahead with confidence, while remaining committed to quality, accessibility and care for both people and place.

On behalf of VisitFlanders, I wish you an enjoyable read. Together with my team, I look forward to hosting you in Flanders, in the footsteps of Roman conquerors, Renaissance artists and French authors.



David Haigh
Chairman and CEO
Brand Finance

In an increasingly interconnected and competitive world, understanding how places are perceived has never been more critical. Over the past five to six years, we have witnessed a profound transformation in how different teams strategically approach place branding. This shift reflects the growing recognition that effective leadership in this field is a cornerstone of long-term success.

At the heart of strategic leadership lies the principle of measurement. As the saying goes, "What gets measured gets managed." The Place Brand Leaders Yearbook, which Brand Finance is proud to support as Title Partner, provides a useful guide to the most important issues in place branding and a forum for governments, businesses, and other key stakeholders to highlight areas of strength and identify opportunities for improvement.

To navigate today's complexities, leaders must adopt a strategic approach that goes beyond reacting to immediate challenges. This means asking fundamental questions: What do we stand for as a place? What do our stakeholders, citizens, investors, and international partners value most about us? And how can we craft a narrative that resonates with these audiences and equips us to withstand the headwinds of global competition?

A place brand is no longer a passive asset but a competitive advantage that must be actively nurtured. Learning from peers and sharing best practices foster innovation, strengthen resilience, and help set the highest standards.

The Place Brand Leaders Yearbook reflects this evolving landscape. By harnessing its strategic insights, leaders can take informed, decisive actions to enhance their place brand and ensure success in an ever more competitive world.

GREETINGS

VOICES FROM THE GLOBAL PLACE BRANDING COMMUNITY



Magdalena Florek
IPBA Education Director
Co-Editor of Place Branding and
Public Diplomacy

Each year, I find myself looking forward to the new edition of the Place Brand Leaders Yearbook, as it has become a reliable and inspiring point of reference to stay updated and continuously learn from practice. The Yearbook offers more than a compilation of cases, it acts as a lens through which we can observe how the field of place branding is maturing. What this edition presents is not a single dominant model or narrative, but the diversity of ways in which places respond to their specific challenges and ambitions. In a field where context matters so deeply, this kind of grounded, experience-based insight is particularly valuable.

The Yearbook offers a rare opportunity to see how ideas translate into action across different settings, making it an excellent resource for anyone who wants to understand place branding beyond theory. The cases reveal how strategies unfold in real institutional settings, how cooperation is built and challenged, and how identity becomes operational rather than declarative. Importantly, the reader is not left alone to analyse these examples. The behind-the-scenes insights and expert perspectives included throughout the Yearbook add valuable layers of context, helping to unpack decisions, highlight trade-offs, and explain why certain approaches were taken.

This makes the Yearbook less about showcasing "success" and more about understanding processes which are often complex, sometimes turbulent, but always instructive.

Taken together, these examples clearly demonstrate that place branding today is inseparable from questions of governance, responsibility, and long-term orientation. The real value of the Yearbook lies in its ability to surface these connections and to encourage a more reflective, nuanced understanding of what it means to lead places in an increasingly uncertain world.



Joao Freire
Professor of Marketing
IPAM/Universidade Europeia,
Portugal

I have come to see the Place Brand Leaders Yearbook as an important reference for anyone working in or researching place branding, not only for the cases it brings together but also for the way it frames the field: as something that goes well beyond communication and is increasingly shaped by governance, identity, and long-term strategic choices.

What I particularly value in the Place Brand Leaders Yearbook is its focus on practice and its scope. It does not focus on a specific type of perspective, such as destination brands for tourism, urban planning for city branding, or public diplomacy for nation branding. Instead, it informs how different places approach their own challenges, how institutions collaborate, and how place brand identity translates into concrete outcomes. For those of us in academia, the connection between theory and practice is also especially relevant. In a field that is becoming more complex, these shared reference points matter. They allow us to compare, to reflect, and to better understand what works, and under which conditions. It also helps us find new avenues of research.

This combination of theory and practical exchange is something I have increasingly observed in my work within the academic community and through my involvement with the International Place Branding Association. As we approach its 10th anniversary — and as I chair the organisation of the upcoming conference in Lisbon (IPBA2026 Lisbon) — there is a clear sense that the field has matured to the point where it recognises the need for ongoing dialogue between researchers and practitioners. There cannot and should not be a division.

The Place Brand Leaders Yearbooks play an important role in connecting practitioners and researchers. They do not simply document what is happening and who is doing what; they help structure the conversations that will shape what we can research later.

PLACES TO WATCH IN 2026

TERRITORIES SHAPING THE NEXT CHAPTER OF PLACE BRANDING

This section presents cities, regions and countries nominated by members of the TPBO network.

These nominations highlight places that practitioners and researchers consider noteworthy for their approach to identity, governance, sustainability, tourism strategy, economic positioning or cultural development.

The list is not a ranking. It offers a snapshot of places attracting attention within the global place branding community in 2026.

01. **AL DIRIYAH**
Birthplace of the Saudi state repositioning heritage for future tourism.
02. **AL GOUNA**
Purpose-built Red Sea town illustrating private-led urban development.
03. **ALMERE**
Planned city experimenting with new models of urban identity.
04. **ALULA**
Desert landscape transforming archaeology into a living cultural destination.
05. **BARCELONA**
Tourism model recalibrated around residents, responsibility and talent.
06. **CANBERRA**
Purpose-built capital grounding civic and cultural identity in lived experience.
07. **COSTA RICA**
Global reputation built on environmental stewardship attracting sustainable investment.
08. **ESTONIA**
Digital governance shaping a distinctive national identity.
09. **FLANDERS**
Network of historic cities operating as a collaborative hosting ecosystem.
10. **GOLD COAST**
Coastal city discovering identity through community and lifestyle.
11. **GOTHENBURG**
Collaborative innovation as a benchmark for sustainable tourism and responsible meetings.
12. **GRAND EGYPTIAN MUSEUM**
Landmark museum reframing ancient civilisation for global audiences.
13. **GRAUBÜNDEN**
Alpine region where landscape and heritage villages define identity.
14. **GREATER COPENHAGEN REGION**
Cross-border region demonstrating how metropolitan collaboration strengthens global competitiveness.
15. **GUELMIM-OUED NOUN**
Southern Moroccan region expressing identity through Sahrawi culture and desert landscapes.
16. **HEERLEN**
Industrial legacy reshaped through culture and urban renewal.
17. **KERKRADE**
Mining heritage rediscovered as foundation for local identity.
18. **LEEUWARDEN**
European Capital of Culture legacy sustaining creative momentum.
19. **LOS RÍOS**
Nature, academia and tourism shaping a collaborative regional identity.
20. **MADINAH**
A sacred city translating heritage into a human-centred model of urban livability.
21. **MEDELLÍN**
Global reference for urban transformation and civic innovation.
22. **MONTPELLIER**
Progressive policy aligning urban growth with sustainability.
23. **PELOPONNESE REGION**
Ancient landscapes shaping a renewed tourism narrative.
24. **SCOTLAND**
Cultural identity and landscapes sustaining a powerful global reputation.
25. **SOUTH AFRICA**
Positioning itself as gateway to the African continent.
26. **SOUTH AUSTRALIA**
Wine regions, cultural festivals and dramatic landscapes defining identity.
27. **SWEDEN**
Nation brand built on trust, democracy and innovation.
28. **THE BENTWAY**
Public space transforming overlooked infrastructure into civic life.
29. **THE HAGUE**
International city embodying its peace and justice identity.
30. **MAT-SU, ALASKA**
Frontier region shaped by vast landscapes and rapid growth.
31. **THE RUHR AREA**
Germany's industrial heartland redefining itself through culture-led transformation.
32. **VILNIUS**
Baltic capital blending historic character with rising creative energy.



MEET THE NOMINATING PANEL

VOICES FROM TPBO'S GLOBAL EXPERT COMMUNITY

The places featured in this yearbook originate from nominations submitted by members of the TPBO Who's Who network and affiliated expert communities. All practitioners, researchers and advisors were invited to highlight territories they consider noteworthy for their leadership in place branding, destination strategy, sustainability or economic positioning.



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MADINAH

WELCOME TO MADINAH

A sacred sanctuary rooted in Islamic history, uniting a rich historical, religious, and cultural heritage with a forward-looking vision for growth and opportunity.

Madinah Al Munawwarah - often referred to as Madinah or Medina – lies in the western region of the Kingdom of Saudi Arabia, approximately 150 kilometres from the Red Sea coast.

Madinah's setting is both striking and strategic. Volcanic plateaus frame fertile oases, while Mount Uhud stands to the north. Today, the city is home to more than 1.4 million residents, a figure projected to reach 2.7 million by 2040. Its urban fabric reflects this growth – an intentional balance of heritage districts, residential neighbourhoods, green corridors, and modern public spaces designed for connection and ease of movement.

This distinctive geography has long shaped Madinah's identity, intertwining natural beauty with cultural and spiritual significance.

Beneath its revered status, Madinah is emerging as a model for contemporary, human-centred urbanism. Guided by Saudi Arabia's Vision 2030, the city is pursuing a development agenda that weaves together environmental leadership, mobility, digital innovation, and cultural preservation. It is a place designed for well-being, where its urban planning decisions are measured not only by efficiency but by the lived experience of residents and visitors alike.

Madinah's progress and global profile is rising rapidly, having advanced 18 ranks in 2 years on the 2025 IMD Smart City Index, the city has earned dual ISO certifications for Resilient Cities and Sustainable Cities, and won the Best Smart City Initiative Award 2023. These accolades speak to more than technical achievement; they mark a civic ambition to become a global reference point for smart, sustainable, and culturally resonant urban development.

These milestones affirm Madinah's position as a city increasingly open to the world, welcoming distinct global investments that align with its values and vision.

Madinah's city brand is anchored in rich heritage expressed through serenity and livability – a quality that extends beyond its historical identity into the way people live, move, connect, and flourish.



THE CULTURAL ESSENCE OF MADINAH

Madinah's identity is shaped as a continuous cultural narrative. Its history is not segmented into periods, but experienced as a single, evolving story embedded in the fabric of the city.

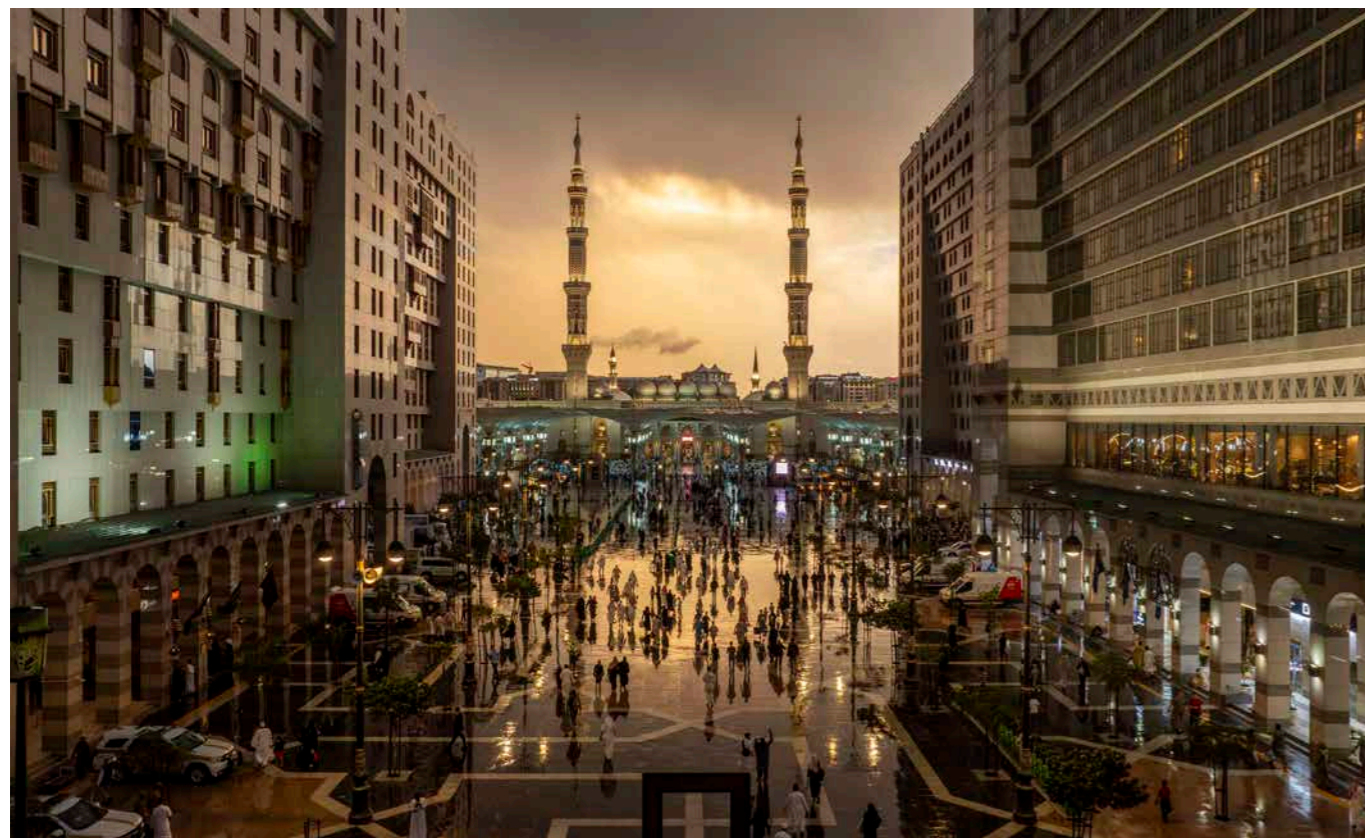
Madinah's cultural identity is defined by the continuity of its history across time. From pre-Islamic inscriptions in the Ar-Rawha valleys to the defining landmarks of early Islam, the city presents a layered narrative where each era remains visible and relevant.

As the second holiest city in Islam and home to Al-Masjid an-Nabawi, as well as the burial place of the Prophet, Madinah receives millions of pilgrims each year. Surrounding this spiritual centre are sites such as Quba Mosque, Mount Uhud, and a network of mosques and wells from the Prophet's era, anchoring the city's early Islamic heritage in its physical landscape.

This narrative extends further. To the north, Al-Hijir (Madain Salih) preserves the monumental tombs of the Nabataean civilisation, while later heritage sites such as Urwa bin Al-Zubair Palace reflect subsequent chapters of the city's evolution. These layers collectively position Madinah as a place shaped not by a single moment, but by continuous cultural development.

Recent initiatives reinforce this trajectory. From the restoration of historic sites such as the Well of Al-Faqir to contemporary institutions like the Prince Mohammed bin Salman Global Centre for Arabic Calligraphy, Madinah is actively extending its cultural narrative into the present. Museums, heritage walks, and cultural programming further translate this depth into lived experience.

In Madinah, history unfolds as an ongoing narrative. Rather than distinct chapters, past, present, and future are sustained as a continuous cultural thread, shaping the city's identity and its evolving role as a cultural capital.



A HUMANIZED, LIVABLE CITY

Livability in Madinah means more than housing or jobs – the city is leading with a bold vision of humanization; rethinking infrastructure and public life around inclusion, connection, and dignity. This vision places people at the centre, weaving faith, community, and future-forward infrastructure into a cohesive urban experience that elevates both soul and society.

Madinah’s transformation begins at the street level. Once car-dominated roads like Quba Street are being redesigned into pedestrian-friendly boulevards, creating vibrant public spaces that foster connection and safety. Walkways, bike paths, and accessibility features for the visually impaired embody a city built for all.

Development projects such as Rua Madinah and Knowledge Economic City emphasize walkability, social interaction, and seamless urban mobility. The city’s layout is structured with ring roads and green corridors, linking spiritual landmarks with daily life through design that invites reflection and movement alike.

GREEN, LIVABLE, AND RESILIENT BY NATURE

Madinah is reclaiming its natural identity by creating green corridors with over 1.2 million trees and millions of square meters of planned green areas, supporting health and community joy in places such as Aleyoun Oasis and Prince Mohammed bin Abdul Aziz Park. The city is cultivating wellness, sustainability, and joy in its everyday rhythms.



This greening effort is not just aesthetic. It aims to combat desertification, reduce environmental pollution, reuse treated water efficiently, and create eco-friendly public spaces.

In Madinah, nature is woven into the city’s fabric, from gardens to eco-hotels; offering a lifestyle that balances serenity with environmental care.



A SMART CITY — DESIGNED FOR PEOPLE

Madinah is positioning itself as a global model for place-led transformation. At the heart of this evolution lies a commitment to humanizing the city experience, where technology serves people, and development is rooted in cultural authenticity.

Leading this visionary transformation is Madinah Region Development Authority, which has crafted a comprehensive smart city strategy anchored in well-being, mobility, sustainability, and spiritual tourism; all under the Kingdom’s Vision 2030 framework. Madinah Region Development Authority is transforming the ancient city into a hub of sustainable and people-first development. Their efforts prioritize quality of life and cultural preservation.

While many smart cities begin with technology, Madinah takes a people-first approach; starting by identifying the real challenges faced by residents and visitors, and defining the outcomes it seeks to achieve: improved quality of life, urban sustainability, and long-term resilience. Only then does the city turn to technology and innovation as tools to deliver on these priorities with purpose and precision.

This strategy reflects a progressive approach where the city’s innovation ambition is shaped and designed based on the habits and behaviour of the people and the city needs. At the core of Madinah’s smart city vision is

GREEN INITIATIVES				
GREEN CORRIDORS				
NATURAL INGREDIENTS (MOUNTAINS – HARAAT)	NATURAL VALLEYS AS GREEN AXES		GARDENS	
6000 Million m ²	44555 Trees		191205 Trees	
60 Hectare	747.6 Trees		956 Hectare	
	16550 Palms			
PUBLIC SERVICES AND PALMS FACILITIES				
ECO-FACILITY BUILDINGS	GREEN MOVEMENT AXES		OPEN SPACES AND SQUARES IN NEIGHBORHOODS	
139320 Trees	66000 Trees		784,800 Trees	
696.6 Hectare	418 Hectare		3239 Hectare	
SPECIAL GREEN ZONES				
AL-AWALI		ALAYOUN OASIS		
1.5 Hectare of Garden	2.25 Eco-hotels	3 Hectare of Orchards	188 Hectare of Garden	439 Hectare of Orchards
TOTAL				
1.2 Million Trees	6750 Hectare		16550 Palms	



Raseel – a city-wide digital platform designed to seamlessly support the region’s transformation through technology. Conceptually, Raseel is structured around three interconnected layers that reflect the city’s integrated approach to smart infrastructure and human-centred innovation:

- 1. Infrastructure Layer:** This foundational layer enables the physical and digital backbone of the city. It includes the deployment of smart utilities, IoT devices (such as sensors, smart lighting, and environmental monitors), and connectivity systems that gather and transmit real-time data.
- 2. Integration Layer:** Acting as the platform’s intelligence hub, this layer consolidates and analyses data from diverse sectors; transport, energy, health, environment, public safety, and more. It ensures interoperability between city departments and systems, enabling coordinated decision-making, predictive planning, and seamless service delivery across agencies.
- 3. Interaction Layer:** This is where technology meets people. Through apps, dashboards, service portals, and citizen feedback tools, the interaction layer translates the smart infrastructure into user experiences that are intuitive, inclusive, and empowering. Tools on this layer facilitate personalized, human-centred engagement.

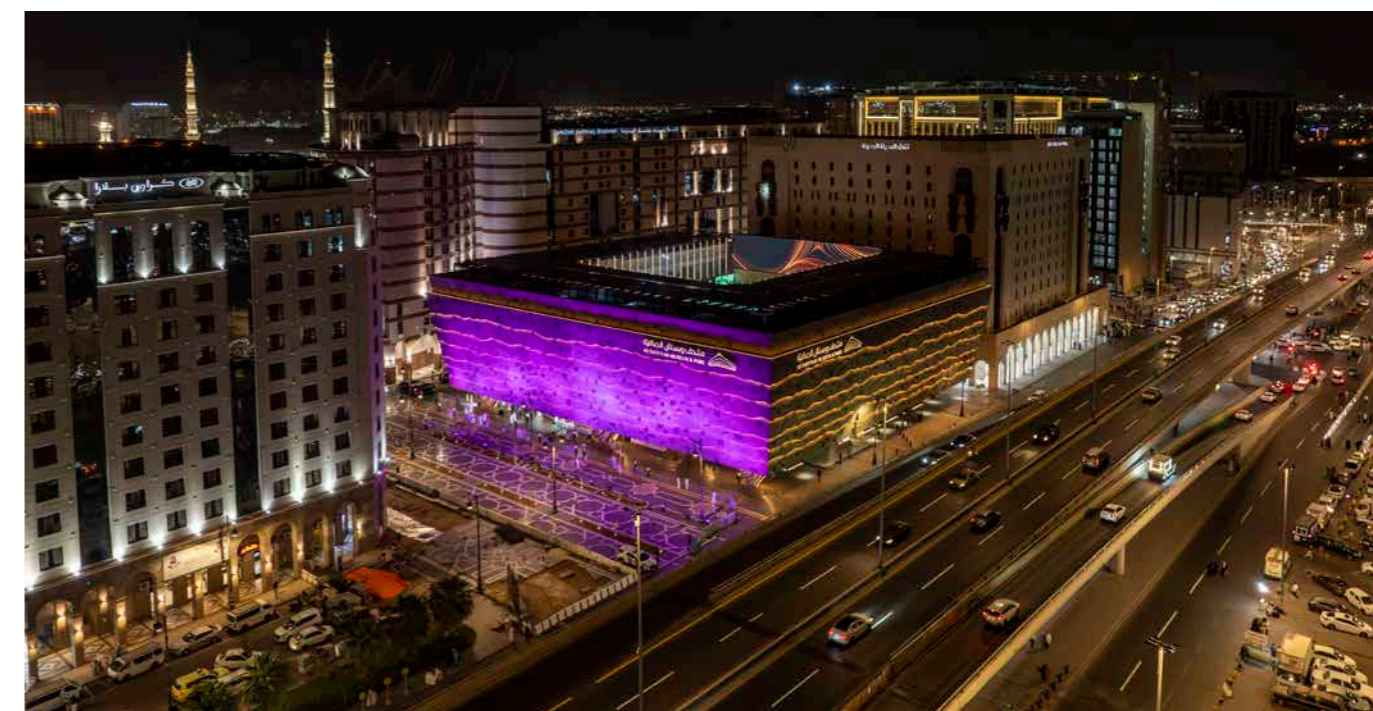
Raseel is not just a digital tool, but a place-enabling platform which exemplifies how Madinah’s transformation strategy is not about automation for its own sake, but about enhancing livability, preserving identity, and creating value for every city stakeholder. Madinah is redefining what it means to be a livable city, one that nurtures both technology and society.



A FUTURE CENTRED ON HUMANITY

In a world chasing smartness, Madinah is choosing humanness. With projects that promote health, community, quality education, and spiritual vitality, this is a city rebranding itself not just through architecture but through intention.

It is building an inclusive future where cultural and Islamic identity are preserved and celebrated, the overall city experience is elevated, urban life remains balanced with nature, and both residents and visitors feel a strong sense of belonging and purpose.



AN EVOLVING HUB — GROWTH ROOTED IN IDENTITY

Madinah is growing and positioning itself as a model for future cities: not by outgrowing its identity, but by deepening it. The city’s development projects revolve around purpose, identity, and impact.

Tourism & Hospitality: Rua Madinah & Knowledge Economic City projects blend modern hospitality with cultural reverence, offering enriched spiritual journeys and contemporary comforts. Projects like The Hills, and Al-Othaim Iconic Development bring new experiences while protecting the city’s serene character.

At a more local scale, Al Hai Hub reinterprets the heritage neighbourhood as a contemporary gathering space bringing together traditional cuisine, cultural expression, and everyday social life into an immersive visitor experience.

Residential Transformation: Mixed-use neighbourhoods like Al-Alya and Dar AlHijrah offer smart, green living close to spiritual and commercial centres.

Health & Sports: With wellness parks, walking tracks, and youth-focused facilities in projects like Al Aqool park and Quba Boulevard, the city promotes both spiritual and physical well-being.

Madinah’s growth reflects the national ambition and is in full alignment with the Kingdom’s Vision 2030 to elevate quality of life, create jobs, and expand the economy through human-centric urbanism.

As it evolves, Madinah is writing a new chapter in city branding — one where spiritual serenity, cultural richness, and sustainable development live side by side.



ABOUT MADINAH REGION DEVELOPMENT AUTHORITY

The Madinah Region Development Authority is a government body spearheading the comprehensive transformation and future growth of the Madinah region, in full alignment with the Kingdom’s Vision 2030 strategy.

Driven by a mission of sustainable, human-centred development, and through its strategic initiatives spanning urban planning, mobility, economic growth, environmental stewardship, and digital infrastructure, the Authority is also at the forefront of Madinah’s city branding, positioning it as a global exemplar of serenity, livability, and cultural depth.

In partnership with public and private entities, the Authority ensures the efficient execution of initiatives that deliver high value and lasting impact, both within the region and on the global stage.



BEHIND THE SCENES

In conversation with **H.E. ENG. FAHAD ALBULIHESHI**

Mayor of Madinah Region and CEO of the Madinah Region Development Authority



Mayor Fahad Albuliheshi reflects on what makes the city compelling to international investors, how livability shapes every planning decision, and what Madinah will look like by 2030 and beyond.

Mayor Fahad; as the city evolves, how do you see it resonating with a broader global audience – investors, visitors, and future residents alike?

Madinah will always be sacred and today its relevance on the global stage continues to grow. We are showing the world that a city rooted in faith and heritage can also lead in innovation, livability, and sustainability.

For investors, this means a city aligned with Vision 2030, where projects carry both purpose and opportunity. For visitors and residents, it means a place designed for well-being, mobility, and belonging.

Madinah has been recognised internationally – from being highly ranked in the IMD Smart City Index to earning dual ISO certifications. What do these achievements mean in practice?

These recognitions confirm that Madinah is moving in step with global standards of excellence. But more importantly, they demonstrate our commitment to people-first development.

Smart systems and sustainability measures only matter if they improve daily life, and in Madinah they do – from safer streets to greener parks and more efficient mobility.

You've spoken often about livability. How does this principle translate into the everyday experience of Madinah?

Livability here is not an abstract idea. It is walking down a street once dominated by cars and finding it redesigned for people. It is the ability to move across the city by bus, e-bike, or train with ease. It is green corridors that cool our climate and parks that host families. It is inclusivity – ensuring that every resident and visitor, from children to the visually impaired, can navigate the city with dignity and connection.

For international investors, what makes Madinah stand out among the world's emerging cities?

We are not building for size; we are building for significance. Our projects – from hospitality to knowledge economies – are designed with cultural depth and long-term value.

Investors are drawn to Madinah because it offers more than returns: it offers alignment with a city of meaning, a city that will remain relevant for generations.

What are the focus areas you would like international investors to prioritise in Madinah?

We welcome investment that strengthens our vision of Madinah as a modern, human-centred city. Key opportunities lie in hospitality and tourism, where projects like Rua Madinah are redefining the visitor experience; in smart infrastructure and mobility, supporting our transformation into a global benchmark for sustainable transport; in the knowledge economy, with Knowledge Economic City acting as a catalyst for innovation and skills; and in green development, from eco-friendly housing to renewable energy.

We also see tremendous potential in health and wellness sectors, building facilities and environments that promote both spiritual and physical well-being. Every investment here is more than a transaction, it is a partnership in shaping a city where heritage, livability, and opportunity converge.

Looking towards 2030 and beyond, how would you describe the Madinah of the future?

By 2030, Madinah will be a city where serenity and progress live side by side. A sanctuary that welcomes millions of pilgrims, yes, but also a modern hub of innovation and investment. Our ambition is simple: to be a global model of livability – a place where heritage shapes, rather than limits, the future.

WHAT MADINAH DEMONSTRATES

Madinah demonstrates how a city can pursue rapid urban transformation without detaching from the identity that gives it meaning. Rather than treating heritage as a constraint, the city positions its spiritual and cultural legacy as the foundation for contemporary development.

The approach is deliberately human-centred. Urban redesign prioritises walkability, accessibility and public space, while digital systems and smart-city infrastructure are deployed as tools that support everyday life rather than define it. In this model, technology follows civic purpose.

What makes the case distinctive is the integration of multiple agendas – cultural preservation, environmental stewardship, mobility, tourism and investment – into a single urban narrative. Pilgrimage, public life and modern infrastructure are not competing priorities but parts of the same system.

The result is a city brand grounded less in promotion than in lived experience: a place where identity, governance and development reinforce one another. In doing so, Madinah signals how heritage cities can evolve while remaining recognisably themselves.

EXPERT VIEW

Madinah is pioneering a holistic approach to urban humanization and smart city initiatives, making it a model for visitor experience enhancement. The city focuses on enriching the spiritual and cultural experience for visitors and pilgrims through initiatives like pedestrian-friendly streets, digital wayfinding systems, and immersive cultural experiences. These efforts position Madinah as a global leader in religious tourism while ensuring a high quality of life for residents.

ABDULRHMAN ALSAYEL
URBAN PLANNING LECTURER & CONSULTANT

EXPLORE MADINAH ONLINE



EXPLORE MADINAH ONLINE



INTERVIEW WITH MAYOR FAHAD ALBULIHESHI



BARCELONA

SUSTAINING GLOBAL APPEAL THROUGH ECOSYSTEM ALIGNMENT

Barcelona's reputation has long been built on a rare combination: economic dynamism paired with a strong sense of place.

Here, innovation and lifestyle are not competing priorities, but part of the same urban experience. The city attracts entrepreneurs, researchers and global firms not only for opportunity, but for the environment in which that opportunity is experienced.

Maintaining this balance, however, is not incidental. It requires continuous coordination between growth, infrastructure and the lived experience of the city itself.

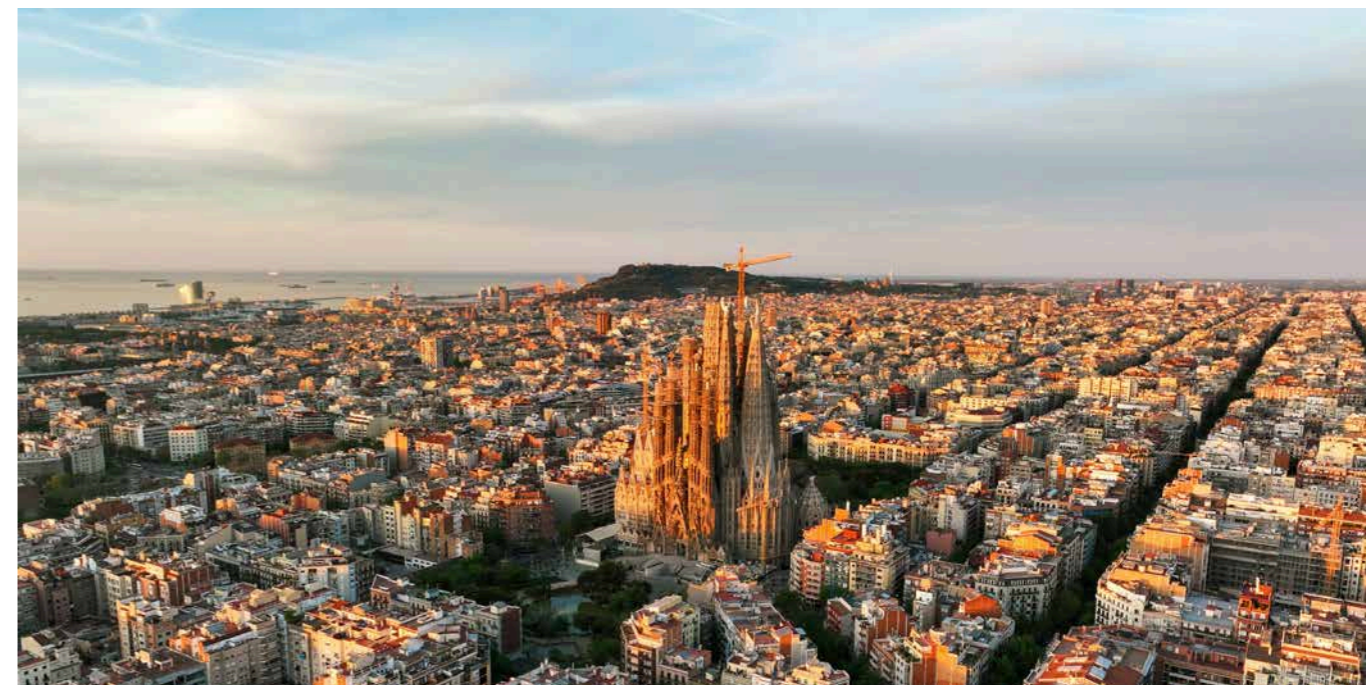
Barcelona's approach suggests that global attractiveness is sustained not by image alone, but by the careful management of the ecosystem that supports it.



FROM ASSETS TO ALIGNMENT

Barcelona's strength lies not only in its assets, universities, research centres, startups and global connectivity – but in how these elements are connected.

Academia, industry and public institutions operate through shared networks and collaborative structures, allowing talent, investment and innovation to reinforce one another. This creates a system where growth becomes cumulative, and the ecosystem strengthens through interaction rather than expansion alone.

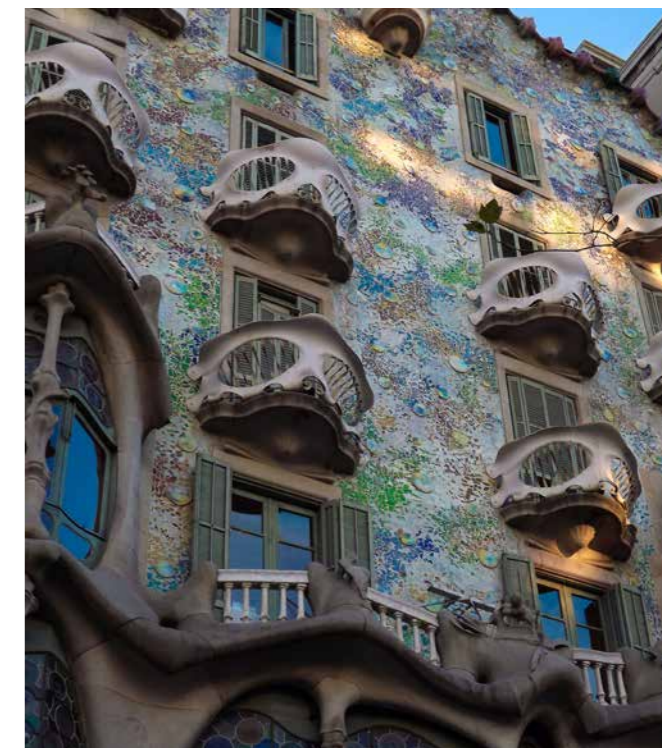


PROXIMITY AND CONNECTION

A defining feature of Barcelona's model is proximity.

Researchers, entrepreneurs, investors and corporates operate within shared networks, enabling ideas to move more fluidly from concept to application. Specialised clusters in areas such as life sciences and frontier technologies create depth, concentration and momentum.

The ecosystem is defined not only by scale but by connectivity.

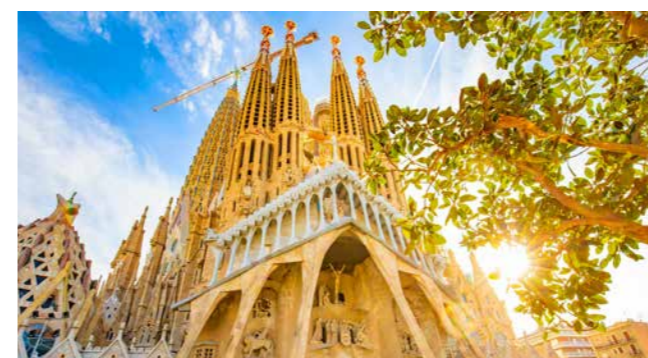


MANAGING GROWTH

Barcelona's success creates its own pressures.

As talent and investment increase, maintaining the balance between economic growth and quality of life becomes more complex. The qualities that attract people to the city such as its culture, openness and pace are also those most at risk.

The response has been coordination. Public and private actors work together to ensure growth strengthens rather than erodes the city's character.



BEYOND REPLICATION

Barcelona is often referenced as a model, yet its experience suggests that success cannot be replicated through visible elements alone.

Its strength lies in the alignment of research, industry, institutions and culture. Without this coherence, initiatives remain fragmented, while Barcelona sets a clear example of integration.

WHAT BARCELONA DEMONSTRATES

Barcelona demonstrates how urban competitiveness is sustained through alignment between ecosystem, lifestyle and institutions.

Its global appeal is not the result of individual assets, but of the relationships between them, with research, industry, talent and governance reinforcing one another within a coherent system. What emerges is an environment where opportunity is not isolated, but interconnected, allowing ideas, people and capital to move with greater ease and continuity.

This alignment requires coordination over time. It depends on the ability of public and private actors to operate with a shared understanding of how the city grows, and how that growth is experienced. In this context, competitiveness is not only about attracting attention, but about sustaining conditions in which talent and innovation can take root and evolve.

In doing so, Barcelona reflects a broader shift in place branding: cities compete less through visibility, and more through their capacity to create environments where people, ideas and opportunity can connect, develop and endure.

EXPERT VIEW

Having lived in the greater Barcelona region for several years, this city does not stop to impress and inspire me. What stands out over time is how tangible its urban model feels in everyday life.

What becomes noticeable is the proximity. Researchers, founders, creatives and institutions are not only present, but accessible. Conversations turn into collaborations with relatively little friction, creating a sense of immediacy that is difficult to replicate in more fragmented environments.

At the same time, Barcelona does not hide its tensions. The pressures of growth are visible, and the balance between openness and preservation is continuously negotiated. This gives the city a certain realism.

From a place branding perspective, Barcelona feels less like a fixed model and more like an ongoing practice, shaped through constant adjustment as conditions evolve.

FLORIAN KAEFER
PUBLISHER, THE PLACE BRAND OBSERVER

INTERVIEW WITH MONTSERRAT PUIG



placebrandobserver.com/montserrat-puig-barcelona-interview

EXPLORE BARCELONA ONLINE



barcelonaglobal.org



CANBERRA, AUSTRALIA'S CAPITAL

A CAPITAL CITY ALIGNING NARRATIVE AND LIVED EXPERIENCE

For much of its history, Canberra has been understood primarily through its institutions. As Australia's capital, the city is often associated with Parliament House, diplomacy and national governance. Yet this institutional image has not fully reflected the everyday experience of the city itself.

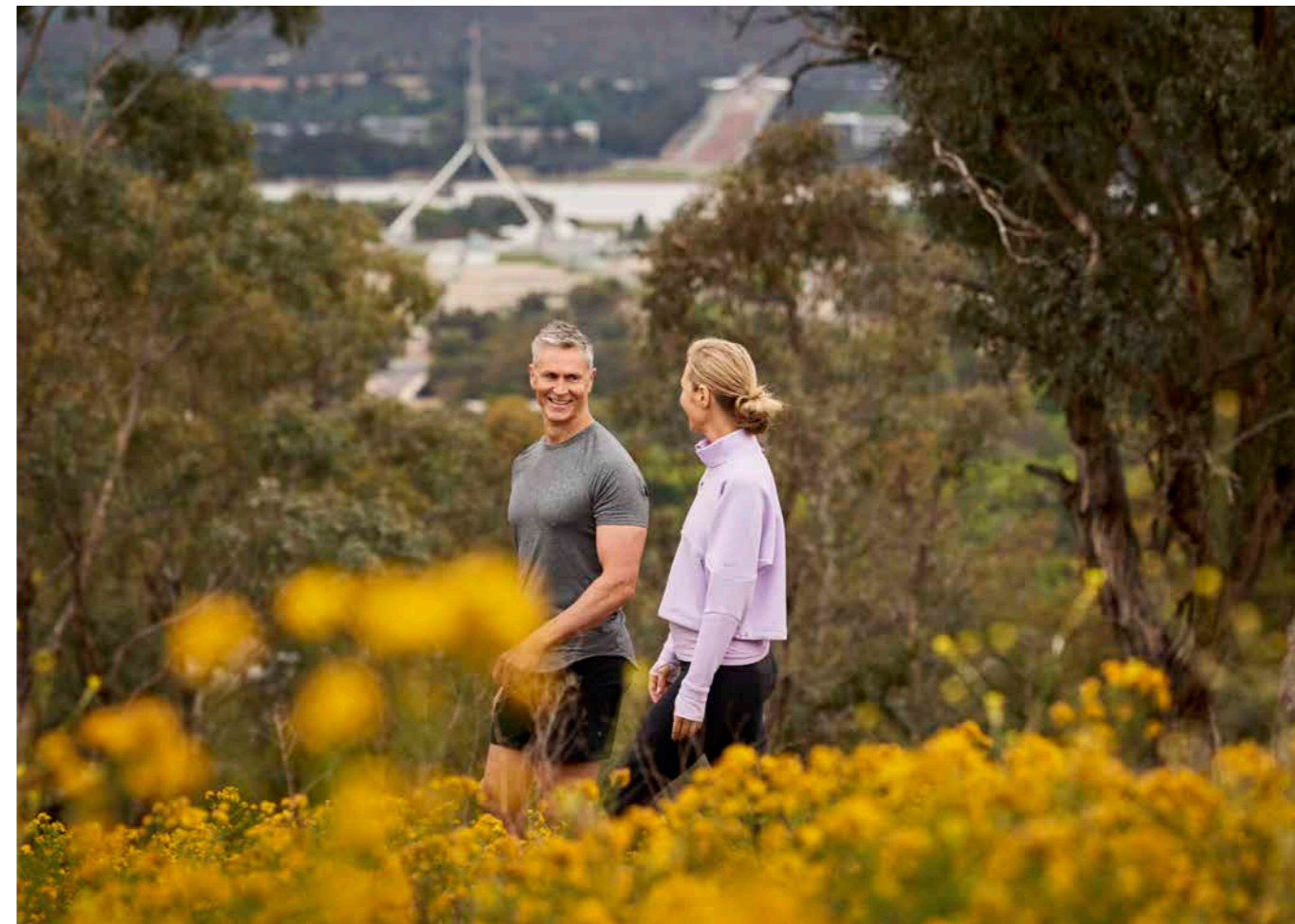
In recent years, Canberra has articulated a different understanding of its identity, grounded in the lived experiences of the people who call the city home.

At the centre of this shift is The Canberra Story, a narrative framework developed through an extensive listening process. Researchers conducted in-depth conversations with residents from across the

community, including entrepreneurs, students, artists, public servants and long-term residents, exploring how people experience the city in their everyday lives. These insights were then tested through a broader community survey to confirm which themes resonated most strongly.

The process was based on a simple premise: the city's story should not be invented but uncovered. The aim was to identify common threads within residents' experiences and translate them into a shared understanding of Canberra's identity.

The result is a narrative that reflects Canberra not only as a capital, but as a community.





A SHARED UNDERSTANDING

Through this listening process, a set of qualities emerged that describe Canberra at its best. Residents consistently describe the city as nurturing, curious, purposeful and balanced, values that reflect both its design and the character of the people who live there.

The nurturing dimension is evident in the city's collaborative culture. Residents describe an environment where new ideas are supported and where businesses, creative projects and research initiatives can develop.

Curiosity is reinforced by Canberra's universities, national cultural institutions and research organisations. The city attracts people motivated by knowledge and discovery, contributing to a culture where inquiry is expected.

Purpose is embedded in the city's origins and continues to shape its identity. Many residents are drawn to work that contributes to public life, science, policy, innovation and cultural development.

Balance completes this picture. Canberra's urban design, green spaces and proximity to nature enable residents to combine professional ambition with a high quality of life.

Together, these qualities describe a city that operates with quiet confidence rather than overt self-promotion.

TRANSLATING NARRATIVE INTO ACTION

The Canberra Story is not positioned simply as a communications tool. It functions as a shared framework guiding how the city presents itself and how organisations articulate its opportunities.

The framework acts as a reference point for decision-making and for how Canberra introduces itself to new audiences.

This alignment is visible across multiple initiatives. Through Canberra.com.au, the city introduces prospective residents, students and investors to life in Canberra through the stories of people already living there. The focus is less on attractions and more on the experience of building a life in the city.

Tourism campaigns have evolved accordingly. Visit Canberra increasingly places residents at the centre of storytelling, recognising that the character of the city is best conveyed through lived experience.

Civic initiatives also reflect this approach. The Chief Minister's Student Welcome brings international students into the community through a shared cultural event during the Enlighten festival, creating a setting that reflects Canberra's inclusive and collaborative character.

These examples illustrate how the city's narrative extends beyond messaging into practice.



A CAPITAL DESIGNED FOR POSSIBILITY

CANBERRA'S PHYSICAL FORM REINFORCES THIS IDENTITY.

Unlike many capital cities shaped by incremental growth, Canberra was deliberately planned. Its design emphasises openness, proximity to nature and clear connections between civic institutions, neighbourhoods and cultural spaces.

Residents often describe the city in terms of space, both literal and symbolic. The landscape provides room for reflection, experimentation and growth, supporting research, creative work and entrepreneurial activity.

The result is a capital that combines national institutions with a strong sense of community. For many residents, Canberra becomes not only a place to work, but a place to remain.



WHAT CANBERRA DEMONSTRATES

Canberra demonstrates how a place narrative gains credibility when grounded in community insight and applied consistently across institutions. Through The Canberra Story, the city has articulated an identity drawn directly from the lived experiences of its residents, establishing a shared understanding of how Canberra sees itself.

That narrative informs how Canberra presents itself across tourism, talent attraction and civic engagement, providing a common reference point for organisations and ensuring continuity across initiatives. It illustrates a broader principle in place branding. Durable narratives are not constructed through messaging alone, but sustained through the practices of the institutions and communities that carry them forward, creating alignment between identity and action over time.

EXPERT VIEW

Canberra's approach shows how a place narrative becomes effective when it resonates with residents and is adopted across institutions. Over time, The Canberra Story has provided a consistent framework used by organisations across the territory to articulate identity and attract people and businesses aligned with its culture.

Its continued use reflects the value of grounding place branding in lived experience and ensuring that narrative, institutions and community remain aligned.

STU SPEIRS
DIRECTOR, INSTID AUSTRALIA

EXPLORE CANBERRA ONLINE



canberra.com.au



COSTA RICA

Costa Rica's rise as an investment destination has not arrived through noise or spectacle. It has come through consistency.

Long recognised for environmental leadership, the country is now shaping a parallel reputation: a stable, high-trust platform for multinational companies seeking more resilient ways to operate across the Americas. This shift is not a departure from Costa Rica's identity, but an extension of it, translating national values into economic strategy.

At the centre of this positioning is a clear message. Costa Rica is competing to be one of the most reliable investment destinations in the region.

A NATIONAL OFFER, CLEARLY ARTICULATED

Investment attraction in Costa Rica is framed as a coordinated national project. Through the Essential COSTA RICA Country Brand, the nation has aligned trade, investment and international reputation into a single narrative of sustainability, innovation and long-term partnership.

The result is a place brand with institutional depth. What is presented externally is supported internally by policy direction, agency coordination and execution capacity.

In a global environment shaped by uncertainty, Costa Rica's proposition is built around reassurance: democratic stability, legal clarity, and a business climate that prioritises predictability over volatility.



WHERE VALUES BECOME AN ECONOMIC ASSET

Costa Rica's advantage is increasingly defined by the combination of economic competitiveness and social credibility.

Nearly all electricity generation comes from renewable sources, giving firms access to low-carbon operations at scale. Governance indicators remain among the strongest in Latin America, reinforcing investor confidence in the durability of the environment they are entering.

For global companies navigating ESG expectations alongside operational performance, Costa Rica offers something rare: sustainability not as an add-on, but as part of the national infrastructure.

This is a country positioning itself not only as a destination for capital, but as a credible long-term partner.

FROM REPUTATION TO INDUSTRIAL REALITY

Costa Rica's investment story is visible in its economic transformation.

Once associated primarily with agricultural exports, the country has become one of Latin America's most significant high-tech manufacturing and services hubs. Medical devices, precision manufacturing and advanced business services now anchor its export economy.

This evolution reflects a deliberate strategy: to move up the value chain, attract knowledge-intensive industries, and embed Costa Rica more deeply into global production networks.

The presence of multinational firms is not simply a measure of attraction, but of integration. Reinvestment decisions, ecosystem development and specialised talent pipelines point to long-term commitment rather than short-term positioning.



FREE ZONES AS A STRATEGIC PLATFORM

A central pillar of Costa Rica's investment model is its Free Trade Zone regime, which has helped create a structured environment for international firms to establish, scale and export.

But the system functions as more than an incentive framework. It operates as part of a broader competitiveness platform, connecting infrastructure, workforce development, trade access and institutional support.

For investors, the proposition is clear: Costa Rica offers proximity to major markets, strong connectivity through trade agreements, and an operating environment shaped by stability rather than disruption.

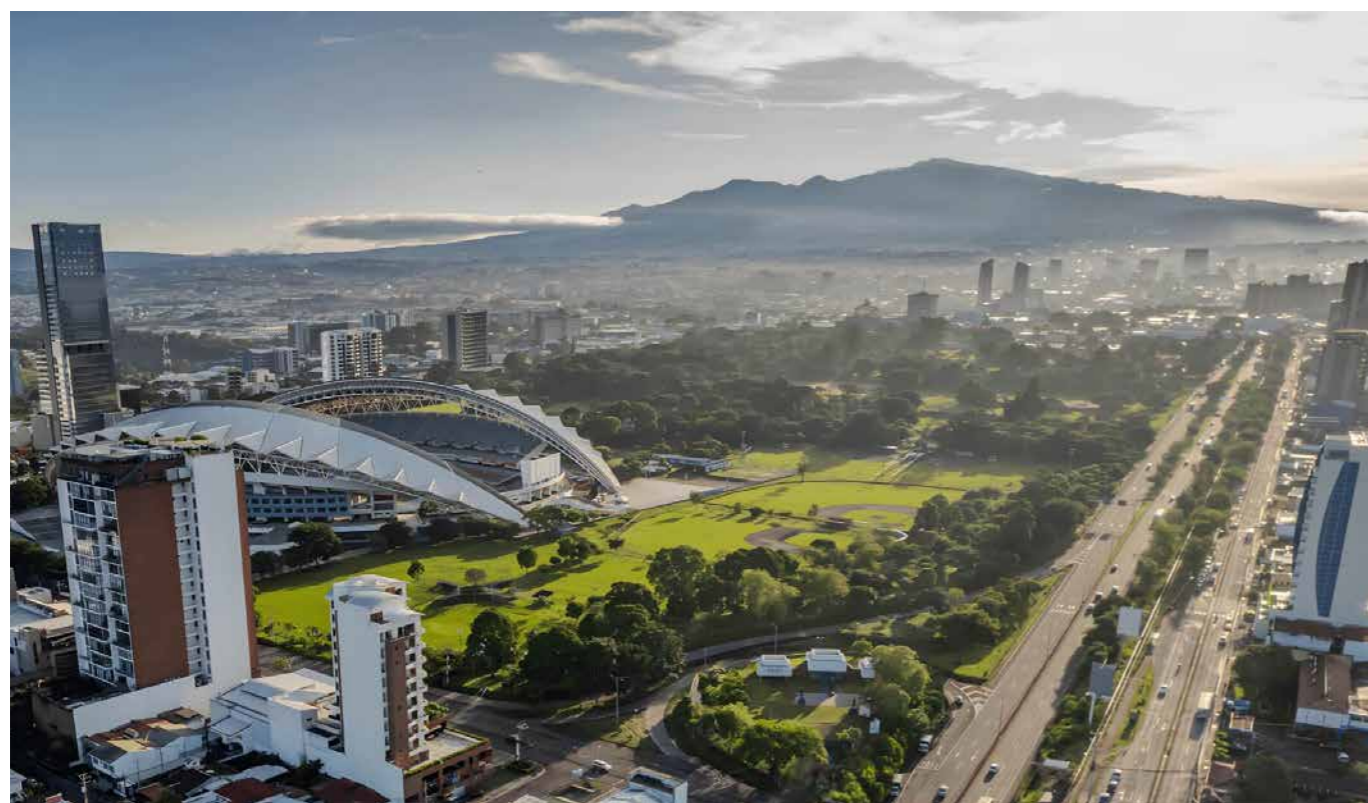
A PLACE BRAND SHAPED BY CONFIDENCE

What distinguishes Costa Rica's investment positioning is its restraint.

The country builds on what it already represents globally: trust, openness, sustainability and long-term thinking.

Costa Rica is leveraging national character as economic advantage, aligning its international reputation with the needs of modern industry.

As companies reassess where to locate, how to reduce exposure, and what kind of environments can support long-term growth, Costa Rica's offer feels increasingly relevant.



WHAT COSTA RICA DEMONSTRATES

Costa Rica demonstrates how investment attraction becomes most compelling when it is built on coherence. By aligning its economic offer with institutional stability, renewable infrastructure and long-term industrial intent, the country shows that competitiveness today is increasingly measured in trust.

What distinguishes the model is the translation of values into economic structure. Through free trade zones, specialised talent development and trade integration, Costa Rica has positioned itself as a hub for advanced manufacturing and knowledge-intensive services.

It reflects a broader shift in place branding, where competitiveness is increasingly shaped by governance, credibility and sustained policy alignment rather than narrative alone.

EXPERT VIEW

Costa Rica is widely recognised for its environmental leadership. Yet what makes it a true success story in place branding is not only its narrative, but the consistency with which that narrative has been translated into long-term action.

When Costa Rica first positioned sustainability at the heart of its Country Brand, it was ahead of the curve. Rather than treating environmental values as a marketing message, the country embedded them into policy, economic strategy and institutional frameworks. The result is a brand that today stands out as one of the most reliable destinations for foreign direct investment in Latin America, particularly for companies where ESG commitments must be genuinely achievable.

Costa Rica's journey illustrates the strategic power of place branding when approached not as promotion, but as long-term orientation. When this process is deliberate and sustained, reputation becomes the natural expression of a country that knows what it stands for. In that moment, place branding becomes far more than communication: it becomes credibility.

GUSTAVO KONISZCZER
MANAGING DIRECTOR, FUTUREBRAND HISPANIC AMERICA

INTERVIEW WITH ADRIANA ACOSTA



placebrandobserver.com/adriana-acosta-costa-rica-investment-interview

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COVER STORY

FLANDERS

Flanders shows how compact historic cities, when connected through shared infrastructure and legacy-driven event strategy, can function as a sustainable hosting ecosystem.

A REGION OF SMALL CITIES

Across Europe, destinations are rethinking how tourism and international convening can contribute to long-term sustainability, local value creation and knowledge exchange. In this context, Flanders offers a distinctive model: a region of compact historic cities that function not as isolated destinations, but as a connected system designed for continuity, collaboration and legacy.

Flanders reveals itself slowly. It is shaped by cities built on trade, craft and civic life; places where history is not curated at a distance, but folded into the present. Market squares still set the pace; waterways still shape routes; civic buildings still anchor public life.

The rhythm is unforced. Much of the region is experienced on foot, with days that move easily between culture and the everyday. Flanders is known for its Flemish Masters, beer and chocolate, but its deeper character lies in its human scale and its unhurried pace.

And because these cities sit so close together, "barely a stone's throw", Flanders rarely feels like a single stop. Each place carries its own mood, yet the connections between them are simple enough that visitors move between atmospheres without losing the thread.



HOW FLANDERS HOSTS

That ease translates neatly into how the region hosts. The distinctness of each city, combined with the simplicity of moving between them, creates conditions organisers quietly value: continuity, choice, and a sense of place that does not need constant explanation.

Because each city offers a distinct setting while remaining closely connected to the others, Flanders has quietly emerged as a sought-after destination for meetings and conferences.

THE ROLE OF THE CONVENTION BUREAU

The Flanders Convention Bureau presents its role less as promotional packaging than as practical coordination around what makes conferences work: venue fit, local expertise, legacy thinking, and continuity on the ground. The offer is framed as public-minded support, designed to reduce uncertainty rather than add another layer to manage.

It reads as connective work: helping shape a local organising base, matching venues and hospitality to need, linking organisers into relevant networks, and supporting hybrid formats through shared infrastructure.

Importantly, the model extends beyond a single office. City conference bureaus are described as ready to welcome delegates and support delivery, signalling that the offer is designed to operate as a distributed system, not a centralised promise.



A REGION THAT WORKS TOGETHER

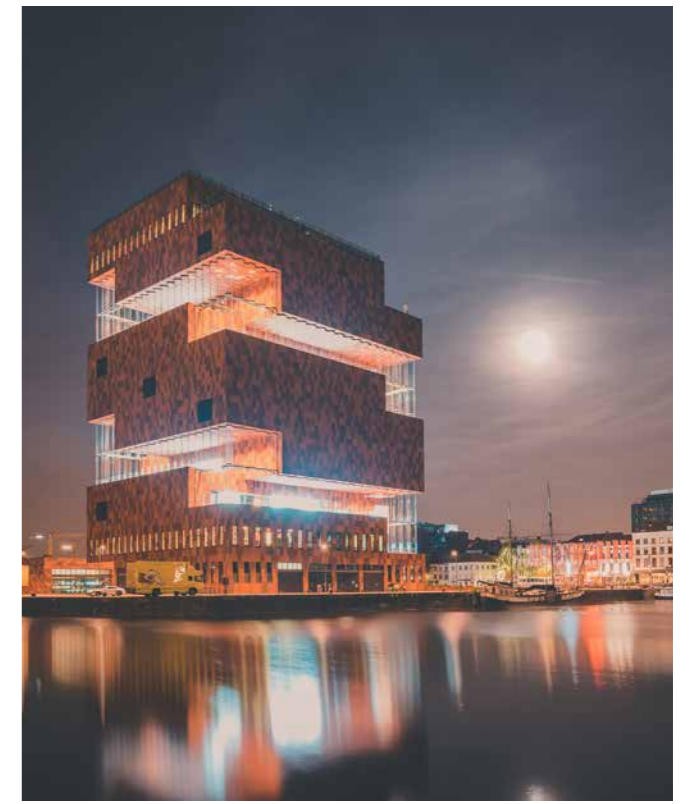
Flanders stands out less for a single flagship than for how easily its cities work together. It is a region of historic cities that remain compact and characterful, yet close enough to function as one hosting system, where variety does not automatically translate into complexity.

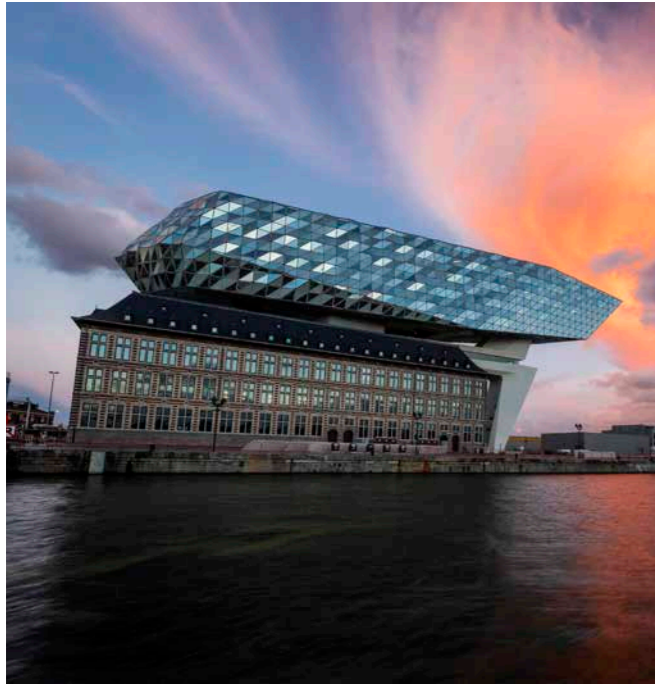
For organisers and delegates, this translates into something increasingly rare: a destination where the programme can stay together. Venues, hotels and social moments sit close together, while neighbouring cities remain within reach when the agenda benefits from

contrast. The strength lies less in scale than in how usable the region feels. In practice, it means fewer handovers, more shared time, and a programme that keeps its flow.

Accessibility matters, but the advantage really begins after arrival. Rail links and Brussels Airport may open the door, yet it is the short internal distances that keep the footprint compact: anchored where it needs to be, flexible where it can be.

What emerges is a regional hosting model that is confident without being loud. It does not overstate; it makes things easier. And that ease becomes part of the value.





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WHERE KNOWLEDGE MEETS CONVENING

Flanders frames conferences as more than visiting content imported for a week. The underlying claim is that the region's ability to convene comes from the presence of experts across institutions, sectors and communities – a local ecosystem that can support the conference topic before, during and after the event.

In that framing, "key industries" is less a branding label than a signal of depth: a landscape of institutions and networks able to participate, contribute and follow through.

This is where Brussels sits as context rather than centre. Flanders can draw on an international environment nearby, while keeping the hosting experience grounded in smaller, navigable cities: a combination that often matters more to delegates than sheer metropolitan scale.

A NETWORK OF CITIES

The region is best read as a network of cities with different roles, close enough to combine without turning the programme into logistics.

Seen this way, the cities become complementary rather than competing. Bruges can carry heritage intensity and atmosphere; Ghent offers a lived-in city with contemporary energy; Antwerp brings design, trade and urban confidence; Leuven holds a university rhythm that suits learning and debate. Other cities can sit in the system as needed. The point is role clarity, not completeness.

Heritage matters because it is treated less as decoration and more as hosting capacity: distinctive settings embedded in city centres, paired with infrastructure that

keeps delivery straightforward. In a small-city context, the effect is simple: it helps the programme extend beyond the venue without adding effort.

The significance is not each city in isolation, but what the network enables – a region that can scale contrast and character without scaling complexity.

GHENT: A CONFERENCE CITY IN PRACTICE

Ghent stands out less for postcard perfection than for the way it holds contrasts together: old and new, civic and playful, compact yet properly alive. The city is described as "historical without being provincial", with a rhythm shaped by a large student population and a centre that remains easy to read on foot.

For conferences, the practical point is not romance but flow. Ghent is positioned as a compact, pedestrian-oriented host city where venues and accommodation sit within what the bureau describes as Belgium's largest pedestrian-friendly historic city centre.

What makes Ghent useful as a "node in the network" is the way heritage becomes usable infrastructure. The city's event settings range from purpose-built capacity (such as the Ghent International Congress Centre) to adapted historic venues (including Oude Vismijn and St Peter's Abbey), with cultural institutions also present in the hosting mix. Local convention partners are explicitly signposted, signalling that delivery is supported as a shared system rather than a single bureau promise.



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MEETINGS THAT CREATE IMPACT

In Flanders, "impact" is framed as more than a well-run event. The bureau's language is explicit: a conference can be a milestone in its domain, but it can also create a positive long-term effect for people in society; a way of treating convening as something that changes what happens next, not only what happens during the week itself.

To make that ambition usable, Flanders Convention Bureau positions its Impact Methodology as a practical roadmap, developed with #Meet4Impact. It is set out as a four-phase sequence: discover the milestone, mobilise key stakeholders, measure outcomes (with an impact report), and communicate the story so the learning travels beyond the room.

The method is also deliberately relational. Mobilising stakeholders is described as building a local support base across government, academic institutions, businesses and NGOs – the people and organisations who can carry an idea forward once delegates have gone home. That logic is reinforced through the bureau's "Legacy Makers" initiative, which it describes as proactive work with entrepreneurs, academics and policymakers to attract and shape impactful international conventions.

Sustainability is treated as the common thread rather than a separate chapter. The Impact Support Package explicitly points to practical choices – sustainable transport, locally sourced catering, hybrid and digital participation options, and more sustainable social programmes, including links to Green Key-certified heritage venues – alongside downloadable sustainability guidelines.

In this sense, sustainability leadership is understood less as a marketing theme than as a design principle shaping how events contribute to knowledge exchange, community benefit and long-term regional development.

What makes this feel more than a slogan is that the bureau places impact inside a wider practice community: it positions itself within the International Impact Alliance (described as a global partnership with more than 30 members), and it points to Impact Day in Bruges (October 2024) as an early sector moment to test the "more to better" agenda in public, alongside a steady stream of impact stories and shared learning that keep the approach alive beyond any single event.



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BEHIND THE SCENES

In conversation with **LYNN AND EVELYNE**



LYNN DAUWE
Hub Coach Marketing,
VISITFLANDERS



EVELYNE BARDYN
Head of Flanders
Convention Bureau


Flanders is widely recognised for its rich cultural heritage, human-scale cities and forward-thinking approach to tourism. The region is strengthening its place brand through sustainability, inclusivity and long-term value creation, guided by VISITFLANDERS.

At the centre of this work, the Flanders Convention Bureau connects the region's identity and strengths with international conference audiences. We spoke with Lynn Dauwe and Evelyne Bardyn about how the Flanders brand is evolving and where they see the greatest opportunities ahead.

Flanders has a well-defined vision for sustainable and inclusive tourism. How would you describe the core of Flanders' place brand today, and how does this vision shape the way the region presents itself internationally?

Lynn: At its core, the Flanders brand is about creating meaningful connections between people and place. Our Travel to Tomorrow strategy aims to build a destination that works for residents, entrepreneurs and visitors. We focus on Flanders' DNA — heritage, remembrance landscapes, gastronomy, cycling and nature — and turn these into high-quality experiences that are innovative and responsible. We want tourism to add value locally, not add pressure.

Evelyne: In business events, we see conferences as catalysts. We connect international associations with Flemish universities, research centres and industry clusters, so events create long-term value beyond the meeting itself. We support organisers to reduce footprint and increase local benefit. For us, the brand is not only about "hosting", but about an open region where heritage, creativity and innovation meet.

FULL INTERVIEW
 [placebrandobserver.com/
destination-flanders-interview](https://placebrandobserver.com/destination-flanders-interview)

VISITFLANDERS invests heavily in professionalising the tourism offer to ensure a high-quality experience for all visitors. How does this commitment influence the way Flanders tells its story — both to leisure travellers and to event organisers?

Lynn: Quality needs systems behind it. We invest in knowledge, partnerships and consistent standards, so experiences are well designed and well delivered. For leisure, that means curated culture, gastronomy, walking and cycling, with sustainability built in. It also means inclusion: through networks like Everyone Deserves a Holiday, we work to make Flanders accessible to more people.

Evelyne: For conferences, professionalisation means working with organisers who share an ambition for impact. We position Flanders as an ecosystem, where events support collaboration and progress. We build communities such as be.digital.flanders and be.sustainable.flanders, and we bring stakeholders together through the Meet in Flanders Academy. The aim is simple: value that lasts beyond the event.

Flanders' cultural heritage, creativity and community values form an important part of its identity. How do you translate these strengths into a coherent narrative that resonates with international audiences?

Lynn: We tell a consistent story about Flanders as a place of culture, creativity and community, with responsibility as a baseline. Our storytelling sits under "state-of-the-art craftsmanship" — how tradition becomes innovation. We also build communities around themes such as World War One and cycling. Across markets, our foreign offices help ensure the same message is shared through media, trade and partners.

Evelyne: In meetings, the Flanders Heritage Venues network helps make the story tangible. When conferences take place in historic locations, delegates experience the destination directly bridging past, present and future. We also align content with place — such as linking a maritime conference in Oostende to the harbour, local innovators and the sea economy. It strengthens the event, supports knowledge exchange, and creates a clearer connection to Flanders.

Sustainability in Flanders goes beyond environmental measures and includes social impact and accessibility. How is this broader understanding reflected in the experiences, services and initiatives you support?

Lynn: We support experiences that are inclusive, meaningful and sustainable. Projects like Selfie for All improve accessibility at cultural sites, and themed routes help people engage with heritage in more active ways. Digital tools, including an AI travel planner, can help visitors find suitable options and travel more responsibly. We also adapt sustainability guidelines into practical tools for partners, with universal design as a guiding principle.

Evelyne: In events, we apply the same philosophy with local organising committees. We support organisers to

design more responsible conferences and to connect with local communities. Some events also show how culture and inclusion can work together — such as the Louder Together Conference in Antwerp, linking performing arts, education and community engagement. The point is lasting value, not only a successful event week.

Flanders' heritage sites and major cultural programmes contribute strongly to the region's brand. Can you share an example where Flanders successfully connected its cultural assets with forward-looking innovation or sustainable development?

Lynn: Our work around the Flemish Masters is a good example. We link museums, cities, partners, researchers and creative industries, and use digital tools to make heritage more engaging and accessible. With Flemish Masters in Situ, we also spread visitors across time and place, supporting the carrying capacity of city centres by highlighting smaller sites beyond the main routes as well as lesser known artists.

Evelyne: Through EventFlanders, we also connect conferences with major cultural programmes, such as The Crystal Ship in Ostend. Linking a B2B event to a wider cultural moment can deepen debate, improve learning, and strengthen networks. It reinforces a key idea: heritage is not only the past — it can be a platform for innovation and "tomorrow's heritage".

Collaboration between local governments, cultural institutions, tourism partners, venues and communities is key to credible place branding. How does Flanders bring these actors together to strengthen a shared identity and long-term vision?

Lynn: Collaboration is central to how we work. We partner with cities, provinces, cultural institutions and tourism stakeholders — public and private — to build long-term

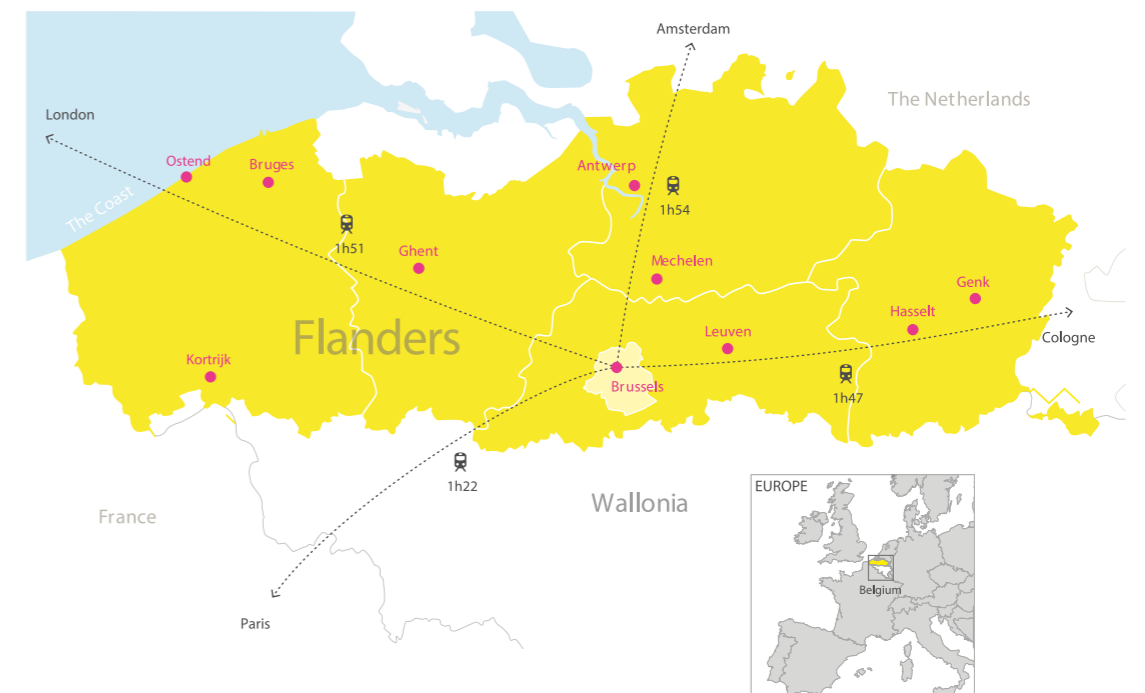
programmes that also serve local needs. Projects such as BRUSK in Bruges, Leuven as Europe's Capital of Culture in 2030, and Smaakhaven culinary hub and cycling are built through co-creation. This takes time, but it creates stronger results and clearer positioning.

Evelyne: In business events, we connect international associations to local ecosystems of expertise. Together with congress cities, we run Team Flanders campaigns and work with ambassadors and "legacy makers" to support long-term value creation. At European level, we collaborate through BEFuture and exchange practice through networks of national convention bureaux and the Alliance for Impact. The goal is shared learning and better outcomes for host communities.

Looking ahead, what opportunities do you see for Flanders to evolve its place brand further, and how will tourism and the meetings industry collectively contribute to shaping that future?

Lynn: The opportunity is to keep building Travel to Tomorrow into practice: high-quality experiences that are inclusive and sustainable, and that protect quality of life. Our marketing should remain inviting, but also responsible — attracting visitors who value culture and place, and who travel with care.

Evelyne: For meetings, the opportunity is to scale impact. Conferences can connect international expertise with local innovation, and they can leave knowledge and partnerships behind. We see this in events that carry legacy forward — such as the European Academy of Childhood Disability moving from Bruges to Dublin, or Velo-city in Ghent building on prior host cities. If tourism and business events align around positive impact, the brand can evolve beyond economic value towards long-term benefit.



WHAT FLANDERS DEMONSTRATES

Flanders demonstrates how a region can compete internationally without relying on a single metropolitan centre. Instead, it operates as a network of compact historic cities that collectively function as a coordinated hosting ecosystem.

Short distances between cities allow programmes to remain cohesive while still offering variety. Bruges, Ghent, Antwerp and Leuven each provide distinct settings, yet their proximity enables organisers to combine venues, institutions and experiences without adding logistical complexity.

The region's approach to meetings and events is also shaped by a clear legacy philosophy. Conferences are framed not only as gatherings but as catalysts for long-term knowledge exchange, collaboration and societal impact.

In this model, place branding becomes almost invisible. Reputation is carried through coordination between cities, institutions and sectors, demonstrating how destination leadership can emerge from systems thinking rather than scale.

EXPERT VIEW

Flanders treats MICE not as an end in itself but as a catalyst for broader regional development. By focusing on specific conference themes such as health, cycling and sustainability, the region strengthens the ecosystems that already exist locally while attracting talent and investment connected to these sectors.

At the same time, events reinforce the destination brand. As a heritage region, Flanders positions itself as a place where history continues to be created. Often quite literally, with conferences taking place in historic venues that reflect the region's identity. A defining element of this approach is legacy. Impact is not measured only during the event itself but tracked over time, sometimes for as long as a decade.

ELKE DENS
FOUNDER & CEO, PLACE GENERATION

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COVER PHOTO: The historical centre of Bruges is recognised as a UNESCO World Heritage Site.

1. Want to impress your conference delegates? Host a reception at the top of St Rumbold's Tower in Mechelen, 97 metres high.
2. In Flanders' cities, an encounter with art is always close at hand. In this case: graffiti art in Hasselt.
3. A boat trip in Mechelen takes you past the 16th-century houses on the Haverwerf.
4. Cycling through the water was named by TIME Magazine as "one of the world's 100 greatest places".
5. The iconic Museum aan de Stroom ("Museum on the River") in Antwerp.
6. The Port House in Antwerp was designed by Pritzker Prize winner Zaha Hadid.
7. The medieval Gravenkasteel ("Castle of the Counts") in Ghent is not only a touristic highlight, it is also a unique venue for your conference dinner.
8. The Faculty Club conference venue is located in the Beguinage of Leuven, also recognised as a UNESCO World Heritage Site.
9. In iconic Bruges, you take the most beautiful selfies.
10. Workshops on the Impact Methodology identify the positive impact your conference can have on society.
11. FMCCA in Antwerp is the only conference venue in the world located within a zoo.
12. In Leuven, you can admire the most beautiful town hall façade in the world.

GOLD COAST

THE GOLD COAST IS MORE THAN A CITY. IT IS A MINDSET.

The Gold Coast's appeal is often described in physical terms: coastline, climate, proximity to nature. These are real, and they matter. But they are not what ultimately define the city — nor what explains its deep and emotional pull.

What distinguishes the Gold Coast today is not how it looks, but how it feels, the culture Gold Coasters have created.

In older Australian cities, people ask where you went to school. Networks are often multi-generational and difficult to crack. On the Gold Coast, it's not about where you came from or who you know. It's about what you're building.

It is a city shaped by choice. By people who arrive deliberately — for opportunity, for a better life, for reinvention — and who stay because the city makes space for them to do so. Over time, those individual decisions have formed a shared condition: open, encouraging and unpretentiously ambitious.

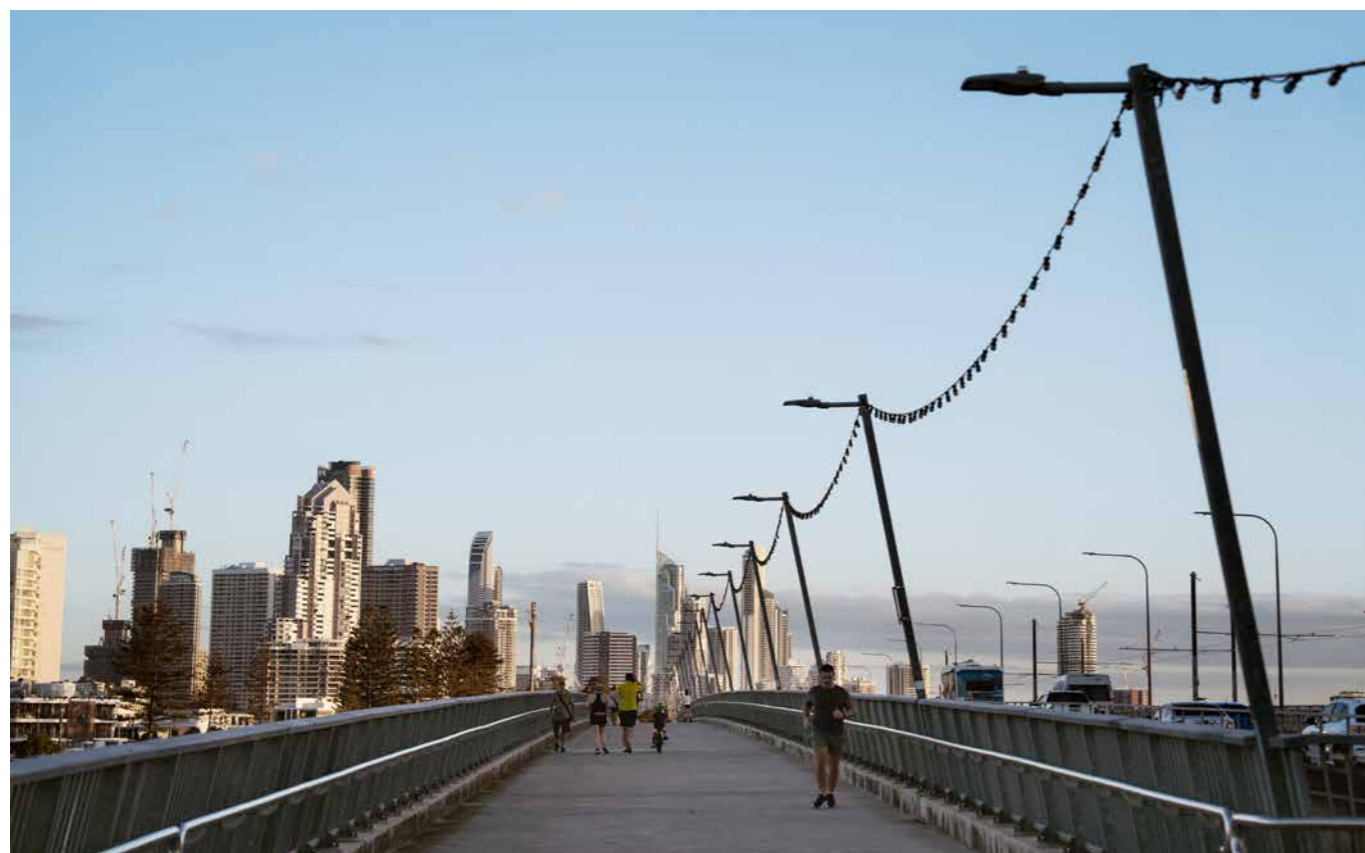
This understanding sits at the centre of the Gold Coast's place branding approach. Rather than asserting an identity, the strategy has focused on recognising one —

paying close attention to how residents describe their relationship with the city, and what those stories reveal about its collective mindset.

The Gold Coast is undergoing a subtle repositioning — not through slogans or spectacle, but through a recalibration of how the city understands itself. Rather than starting with a prescribed identity and projecting it outward, the city's place branding approach has moved in the opposite direction: inward, toward lived experience. The emphasis has shifted from defining the Gold Coast as a product to understanding it as a shared mindset — one formed by the choices of those who live here, work here, study here, and build here.

For Brand Gold Coast, the task has not been to refine the city into a message, but to hold a mirror to it — and to understand which truths are strong enough to travel. The organisational mission is simple: to help everyone use the Gold Coast story to build everything.

This is a city comfortable with becoming. One that does not over-explain itself, and does not wait for permission. On the Gold Coast, possibility is not positioned as an aspiration. It is treated as a given.



THE CITY THAT SAYS YES

Not as a slogan, but as a pattern of behaviour.

As one of Australia's youngest major cities, the Gold Coast has grown in motion. Its population is largely self-selected, its institutions shaped alongside expansion rather than inherited from a distant past. The result is a city less bound by legacy and more accustomed to decision-making under change.

This context matters. Where older cities often default to protection, the Gold Coast has learned to operate through momentum. New ideas are met with curiosity before resistance. Networks form quickly. Access is informal. Status matters less than intent.

From a place-branding perspective, this is significant. The Gold Coast's character is not anchored primarily in heritage or symbolism, but in behaviour — in what the city repeatedly allows, enables, and accelerates. Over time, those choices have created a recognisable condition: openness to reinvention, tolerance for risk, and comfort with newcomers.

This is the environment in which the Gold Coast's place brand has taken shape. Not as a layer applied to policy, but as a reflection of how the city already operates and a strategic engine. This is who we are, at our best. Let's go back to it before we say or do anything. The Gold Coast did not brand itself as a city of positive change. It behaved like one first.



FROM STORIES TO SYSTEM

At the centre of the Gold Coast's place brand strategy is a simple but often overlooked premise: cities are not owned by institutions, but by the people who choose them.

Rather than beginning with positioning statements or target markets, the Gold Coast's approach has prioritised listening. Extensive one-on-one engagement with residents was used to surface how people describe their relationship with the city — why they arrived, why they stayed, and what they believe the place enables in their lives. The objective was not to collect testimonials, but to identify patterns.

Those patterns proved remarkably consistent.

Across backgrounds and generations, residents described the Gold Coast as open, permissive, and oriented toward possibility. Reinvention featured prominently, as did a lack of social hierarchy and a shared comfort with positive change. The story did not need to be invented. It revealed itself through repetition.

This distinction is critical. In many cities, community engagement is used to validate a strategy already in motion. On the Gold Coast, it functions as the strategy itself.

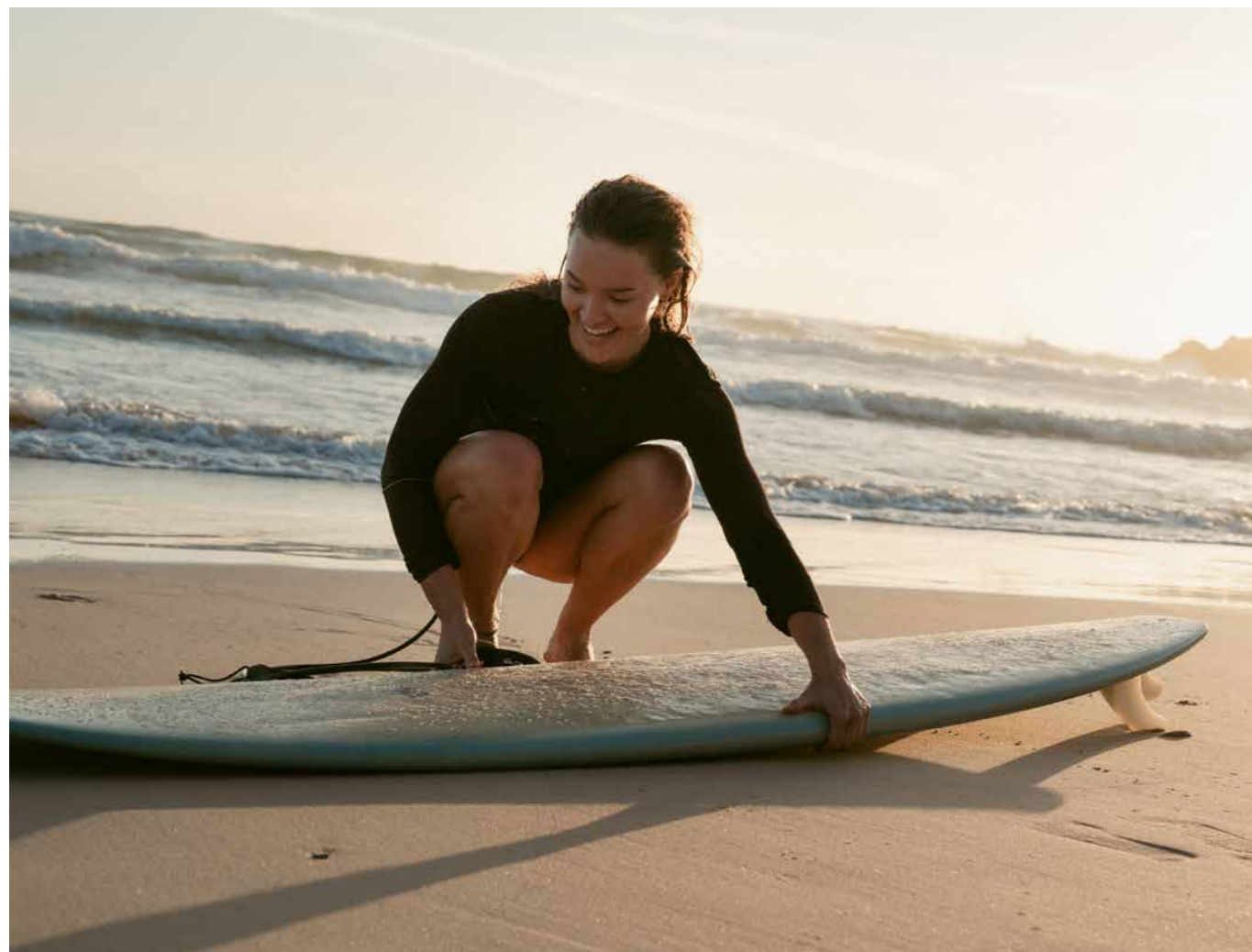
The role of the brand is not to define identity, but to recognise it — and to provide a framework through which that identity can be expressed consistently across sectors, partners, and decisions. The place brand is not a campaign. It is an operating system.

This represents a mature evolution in place branding practice. Storytelling here is not treated as promotion, but as infrastructure. It creates cultural alignment, reduces friction, and improves decision-making efficiency. When multiple actors are working from a shared understanding of "who we are," fewer resources are spent correcting misalignment later.

In this context, Brand Gold Coast's role is best understood not as a marketer, but as a steward: holding the story steady, protecting its integrity, and ensuring it remains rooted in lived experience as it travels beyond the city.

The business model is client-service, not promotion.

The strategy does not ask the world to see the Gold Coast differently. It asks the Gold Coast to see itself clearly — and then lets the rest follow.



HOW THE MINDSET LIVES

The Gold Coast mindset is not abstract. It shows up daily — in routines, choices, and patterns of interaction.

The city's relationship with health, time, and the outdoors is not framed as aspiration, but as normality. Public space is actively used. Informal communities form through shared activity rather than formal affiliation. These behaviours shape how people connect, collaborate, and sustain energy over time.

What emerges is a way of operating. The Gold Coast attracts people motivated less by status and hierarchy, and more by flexibility, autonomy, and momentum. Many arrive during moments of transition — career shifts, personal resets, family decisions — and find a city that absorbs change with relatively low friction.

This has tangible implications for talent and enterprise. Hybrid careers are common. Portfolio work is normalised.

Creative practice, entrepreneurship, professional services, education, and advanced industries coexist within a culture that values output over formality. Ambition is everywhere, but rarely announced.

Crucially, informality does not imply ease. The prevailing ethic is effort. The Gold Coast's relaxed exterior masks a population that works hard to sustain the conditions it values. In this sense, the mindset operates as both invitation and discipline — offering freedom, while quietly demanding contribution.

Here, the place brand reflects lived reality. Consistent behaviours, reinforced through participation, give the Gold Coast a stable identity. That consistency enables the city's appeal to travel with credibility, grounded in experience rather than assertion.



STEWARDSHIP, NOT PROMOTION

ON THE GOLD COAST, PLACE BRANDING HAS BEEN STRUCTURED AS A FORM OF STEWARDSHIP.

Brand Gold Coast operates less as a promotional engine and more as a system of alignment — designed to hold the city's story steady as it is interpreted and expressed by many different actors. Its role is not to lead with visibility, but to create coherence and reduce fragmentation.

This approach reflects a clear understanding of the brand as a shared public asset. Rather than centralising storytelling, Brand Gold Coast focuses on shaping the conditions in which coherence can emerge. Its influence is exercised through research, guidance, expertise, frameworks, celebration, and shared reference points — helping diverse actors to make decisions that remain recognisably Gold Coast without requiring uniformity.

From a place-branding perspective, this represents a mature shift. The brand is treated less as a message to be broadcast and more as a framework for decision-making. Over time, this framework becomes operational. It informs what is prioritised, what is supported, and what is allowed to evolve.

In practice, this means Brand Gold Coast's influence is often indirect. Its impact is visible not in individual campaigns, but in the cumulative effect of aligned choices made across sectors over time. The brand's strength lies in its capacity to be held collectively — and in its ability to remain stable even as the city continues to change.

Culture drives the economy.

For cities navigating growth, complexity, and competing agendas, the Gold Coast's approach offers a valuable reference point. Stewardship, when applied with discipline, allows a place brand to move beyond promotion and into governance — supporting long-term credibility without demanding constant explanation.

A CITY COMFORTABLE BECOMING

The Gold Coast has been shaped by movement from its earliest growth. What distinguishes it now is not that it changes, but how easily it lives within that state. The Gold Coast does not pause to explain itself. It continues.

This is a city shaped by choice — by people who arrive with intention and participate actively in creating what comes next. Over time, those individual decisions have formed a shared rhythm: open, adaptive, and forward-facing.

Its brand reflects this sensibility. Identity here is not fixed or final, but held with enough clarity to move without losing direction. Grounded in lived experience, the city's narrative evolves naturally — capable of stretching, absorbing, inviting, and recalibrating as the city grows. The Gold Coast is not for everyone, but for thousands of people every year it is precisely what they are looking for.

For place branding as a discipline, this offers a quiet but important reminder. The most enduring stories are not imposed. They are recognised, curated, stewarded, and given space to mature. When that happens, confidence replaces persuasion, and coherence drives communication.

The Gold Coast remains unfinished — by design. Its identity is not something to be completed, but something to be carried forward. A city shaped by participation, and strengthened by its willingness to keep becoming.



BEHIND THE SCENES

In conversation with **TODD BABIAK**
CEO of Brand Gold Coast



This conversation explores how Brand Gold Coast approaches place branding as a long-term civic asset rather than a marketing exercise. At the centre of the strategy lies a simple principle: before projecting an identity externally, a city must first understand itself internally.

Coming to the Gold Coast with an international perspective, what first convinced you the city had a distinctive story to tell?

The Gold Coast is well known in Australia, but its reputation doesn't always reflect how residents actually experience the city. The more time I spent here listening to people, the more I recognised a gap between perception and reality. What stood out most was the emotional connection residents have to this place and the sense that moving here often represented a personal life change.

You emphasise listening before projecting a place brand. What risks arise when cities position themselves without that internal clarity, and what does meaningful listening look like at city scale?

Places are not consumer products. A city's identity comes from the people who live there and the reasons they chose to stay. There is no shortcut to understanding that. Listening means spending time with residents and asking why they live where they live, what they value, and how they see the city. On the Gold Coast we worked with research partners to build a representative panel reflecting the full cross-section of the population. It combines science with conversation.

Through your conversations with residents, what surprised you most about the Gold Coast's identity?

Many residents admitted that before moving here they believed some of the stereotypes associated with the Gold Coast. Those assumptions disappeared quickly once they arrived. What emerged instead was a shared culture of people willing to take risks and change their lives. Many residents moved here from somewhere else, which creates a mindset of openness and experimentation.

The Gold Coast is often described as a city that "says yes." Is that cultural, structural, or both — and how do you preserve that openness?

Culture drives it. Many cities can feel closed to newcomers and ideas. The Gold Coast is different because most people remember what it was like to arrive here themselves. That creates an environment where new ideas move quickly if they feel right for the city.

You describe the Gold Coast brand as a shared public asset rather than a marketing product. How does that reshape Brand Gold Coast's mandate?

"Brand" can easily be confused with marketing. For us it is closer to an operating system for decision-making. A small team can only scale its impact by helping others use the city's story in their own work, whether that is investment, planning, or communication.

Stewardship implies responsibility beyond campaigns. How do you maintain long-term coherence across institutions and partners?

It cannot be imposed. Even if we had the authority to require everyone to follow the brand, it would not work. Our role relies on influence and collaboration. Over time the goal is to build consistency through shared language and shared ambition.

With the Brisbane 2032 Olympic and Paralympic Games approaching, what would meaningful success look like for the Gold Coast beyond metrics or investment figures?

Success will come through confidence built gradually over time. The Games will bring attention to the region, but the real opportunity lies in continuing to build something distinctive for the city itself. That will likely come through many smaller actions rather than a single defining project.

Was there a moment when alignment proved harder than expected — and what did that reveal about the complexity of modern city identity?

There is always shared language and common goals, ways in which cities start to copy one another, especially a misunderstood and under appreciated city like the Gold Coast that has felt like an underdog for a long time. Our goal is to encourage Gold Coasters to see that being different is good. And we didn't invent this. Gold Coasters told us this story.

Ten years from now, how would you hope residents describe Brand Gold Coast's role in the city's evolution?

In ten years, I would be proud if the Gold Coast brand was alive and humming, building confidence, creating enormous value, and few people knew the role Brand Gold Coast played. The secret orchestrator of a beautiful symphony.

INTERVIEW WITH TODD BABIAK



[placebrandobserver.com/
todd-babiak-gold-coast-interview](https://placebrandobserver.com/todd-babiak-gold-coast-interview)

WHAT THE GOLD COAST DEMONSTRATES

The Gold Coast demonstrates that place branding becomes most powerful when it moves beyond messaging and into behaviour. By treating identity not as something to be invented but as something revealed through lived experience, the city shows how coherence can be built without overstatement.

Rather than attempting to redefine the city, the brand platform begins by examining how the Gold Coast already functions: the optimism shaped by coastal life, the openness that comes from rapid growth, and the confidence of a place comfortable with reinvention. The strategy therefore acts less as a creative exercise and more as a process of reflection — distilling a civic mindset that residents already recognise.

This reflects a pragmatic understanding of reputation. Branding here does not attempt to impose a narrative from the outside. It organises the city's existing character into a shared framework that institutions, businesses and communities can recognise and carry forward.

For fast-growing places, the lesson is clear: credibility emerges when a brand articulates how a city already behaves. When identity is grounded in lived culture rather than constructed messaging, place branding becomes an act of alignment — ensuring that communication reflects the reality of the place itself.

EXPERT VIEW

What makes the Gold Coast particularly interesting from a place branding perspective is that its identity is grounded less in imagery and more in behaviour. Rather than relying primarily on promotion, the city has articulated a clear mindset shaped by openness, reinvention, and opportunity.

This approach resonates strongly in today's global competition for talent and investment, where credibility increasingly depends on lived experience rather than messaging. The Gold Coast shows how a place brand can function as a framework for alignment across institutions, businesses, and residents, helping the city move forward with clarity and confidence.

KONRAD JAGDZINSKI
DIRECTOR OF PLACE BRANDING, BRAND FINANCE

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GOTHENBURG

A CITY WHERE SUSTAINABILITY SHAPES THE VISITOR EXPERIENCE

Gothenburg stands out less for grand declarations about the future than for the consistency with which it improves everyday life in the present. Shaped by centuries of exchange through its harbour, universities and industries, the city has developed a collaborative culture that is outward-looking yet grounded.

For visitors, this translates into something increasingly rare: a destination where quality of life is not staged but simply lived. Gothenburg's appeal lies in its human scale, its closeness to water and nature, and its ability to welcome the world without losing its rhythm.

Gothenburg builds its reputation through steady progress rooted in Swedish civic values — democracy, equality, inclusion and environmental responsibility — applied not as abstract ideals but as daily practice.

A VISITOR ECONOMY AROUND DAILY LIFE

Gothenburg approaches tourism as part of its wider urban system rather than as a standalone sector. The visitor economy is shaped to enhance quality of life for residents first, based on the conviction that a destination must work for the people who live there in order to remain credible for those who visit.

Over time, this approach has positioned Gothenburg as one of the world's leading sustainable destinations. The city has ranked at the top of the Global Destination Sustainability Index multiple times, reflecting long-term work rather than short-term campaigns.

For travellers, sustainability is not communicated as a label. It is experienced through how seamlessly the city works.



DESIGNED FOR SUSTAINABLE COMFORT

One of Gothenburg's clearest destination signals is its hospitality sector, where environmental responsibility has become a shared standard rather than a niche distinction. In 2024, 96% of all hotel rooms in the city were environmentally certified, making Gothenburg one of the greenest hotel cities in the world.

What matters is not the statistic itself, but what it enables: a visitor experience in which sustainable

choices are not something to search for, but something that is already in place. Hotels across the city operate with renewable energy, reduced waste systems, and increasingly circular approaches to food and sourcing.

From rooftop gardens supplying restaurant kitchens to long-established ecolabel practices in major hotel groups, Gothenburg demonstrates how sustainability can become part of the destination baseline — quiet, consistent, and credible.



A CITY THAT MOVES LIGHTLY

Gothenburg's compactness makes it particularly well suited to low-impact travel. The city functions as a pocket-sized metropolis where most points of interest sit within walking or cycling distance, allowing visitors to experience neighbourhoods slowly rather than through constant transit.

This is reinforced by infrastructure designed for shared movement. A well-established rental bike system,

an extensive tram network running on fossil-free electricity, and an increasingly electrified fleet of buses and ferries make sustainable mobility feel effortless.

Movement through Gothenburg becomes part of the pleasure of visiting: travelling across water by ferry, arriving at cultural venues by tram, or moving between city and coastline without the friction of car dependency.



SEASONAL TASTE AND COASTAL LIFE

The city's identity has always been shaped by the sea, and its food culture reflects the West Coast landscape: seafood, seasonal produce, and a dining scene grounded in origin and understated precision.

Sustainability here is often expressed through taste. Restaurants work closely with local farmers, build menus around vegetables and fish rather than meat, and treat waste reduction as part of culinary precision.

The result is a culinary experience that feels distinctly Gothenburg: modern Nordic dining with a strong sense of responsibility, where the seasons co-write the menu and sustainability enhances rather than limits pleasure.



WHERE EVENTS SERVE THE CITY

Gothenburg is one of Scandinavia's most active event cities, but what distinguishes its approach is how gatherings are treated as civic tools. Festivals, concerts and cultural programmes are designed to generate shared pride while testing sustainable solutions at scale.

The city has become known for event formats that embed environmental thinking into the experience itself. The Way Out West festival has served fully vegetarian food for over a decade, while the Gothenburg Culture Festival has piloted disposable-free systems with measurable impact.

Events here do not sit apart from the city's values. They reinforce them, turning tourism into participation in Gothenburg's public life rather than consumption from the outside.



MEETINGS WITH PURPOSE

The meetings and convention strategy follows the same logic. Gothenburg's role as a host city is shaped not only by capacity, but by responsibility: conferences and congresses are expected to contribute to knowledge exchange, local partnerships and long-term urban benefit.

Sustainability is embedded as standard practice across venues, from renewable energy use to low-waste operations and inclusive programming. Hosting becomes less about volume and more about legacy — ensuring that global gatherings strengthen the destination rather than simply passing through it.

SUSTAINABILITY — A DAILY PRACTICE VISITORS CAN FEEL

Sustainability in Gothenburg is the result of steady, cumulative work rather than isolated initiatives. It is not treated as a separate agenda, but as a civic baseline — embedded into the systems that shape everyday life.

Urban mobility, food culture, energy use, tourism management and public space are approached as interconnected parts of the same long-term project. Progress here comes through alignment: institutions, businesses and residents moving in the same direction, often without needing to announce it.

This is part of what makes Gothenburg distinct as a destination. Environmental responsibility is not presented as an identity layer added on top of the city. It is experienced as the way the city functions.

For visitors, this creates a rare sense of ease. Sustainable choices do not feel like alternatives. They feel like the default.

The strength lies in the consistency and continuity of the system, not any singular initiative.

Gothenburg's sustainability is ultimately defined by its ordinariness. The most powerful leadership in sustainability is not performative. It is the kind that becomes part of daily infrastructure: a city where responsibility is built into comfort, and where the visitor participates simply by being present.



BEHIND THE SCENES

In conversation with **KATARINA THORSTENSSON**
Sustainability Strategist, Göteborg & Co



Gothenburg continues to set the global standard for sustainable destination development. Driving this momentum is Katarina Thorstensson, whose strategic leadership has helped position the Swedish city as a seven-time world leader in the Global Destination Sustainability Index.

From major international events to long-term policy integration, Katarina's work is shaping how Gothenburg balances tourism, innovation, social and environmental responsibility. In this interview, she reflects on the city's brand evolution and the role of sustainability in shaping the visitor experience.

Katarina, what first drew you into the world of sustainable destination development — and how has your personal journey shaped Gothenburg's approach to tourism and place branding?

I started my career at Göteborg & Co working mainly with our International Science Festival, where sustainability — viewed from many different perspectives — kept coming up. I found it intriguing, complex, necessary, and deeply meaningful, and quite early on realized this was my way forward — and, more broadly, the future for any modern organization.

Connecting those insights to our role as a destination organization, having the ability to influence a wide range of stakeholders while being accountable for our own decisions, felt like the perfect combination. That intersection felt both challenging and motivating.

At the time, "sustainable destination development" was still a relatively unfamiliar concept, both to me and the organization. Looking back, I'd say Gothenburg and I have shaped each other along the way. It's been a reciprocal journey — we've grown and evolved together.

Gothenburg has been ranked the world's most sustainable destination for seven years in a row. What do you see as the key drivers behind this consistency — and what does it take to stay at the top?

Early on, we set a shared ambition together with our stakeholders, a common vision: to become a leading destination for sustainable meetings and events. We didn't have all the answers, but we had strong alignment and a willingness from everyone to contribute. In some cases, that even meant setting aside competition for the greater good of the destination.

INTERVIEW WITH KATARINA THORSTENSSON



placebrandobserver.com/katarina-thorstensson-gothenburg-interview

That foundation — trust, long-term collaboration, and a shared vision — is still what carries us. And over time, we've seen that the work delivers: attracting business, gaining international recognition, and embedding sustainability as a natural part of how we operate.

But staying at the top is a different challenge than getting there. It requires consistency, patience, and a willingness to keep evolving. I say destinations don't compete on sustainability; they collaborate on it. At the same time, benchmarking and a bit of friendly competition never hurts.

As Head of Sustainability and advisor to major events, how do you integrate sustainability in practice — beyond the strategy documents — especially when working across sectors and stakeholder groups?

One of the most important lessons I've learned is that alignment on why comes before everything else. If that's not in place, the rest will be so much harder.

From there, it's about being clear on the key issues we need to address, agreeing on direction, and then distributing ownership. Vision, goals, and frameworks are set together but implementation is decentralized. Each organization and each function, needs to translate that into action in their own context, the right responsibility in the right place.

It's important to inspire and empower people in this process. It doesn't have to be complicated, it's better to do something than do nothing. At its best, my role is to gently lead, inspire, challenge, and support, and to create enough confidence and trust for people to try, fail, and improve. Because progress rarely comes from getting everything right the first time.

In your experience, how has Gothenburg's brand evolved through its sustainability work? Is there a conscious narrative you aim to project to international visitors, investors, or partners?

Our sustainability work has gradually become an integral part of our brand, not as a layer on top, but as something embedded in how we operate. One of our core narratives is that we have high ambitions and strong commitment, even if we don't always have all the answers from the start. But we're not afraid to test, learn, and improve and we back up our claims with real action and results. We want to position ourselves as being in constant progress.

Another important perspective is that sustainability is not an elite project to us. We need to be many. We need both leaders and followers, both cutting-edge solutions and broad participation. My saying is that it's better that many do good things than a few do everything perfectly. That's how real transformation happens.

I think our way is best reflected through this feedback we got from a peer: "What stayed with me the most was the openness and humility in Gothenburg's approach. You didn't claim to have all the answers or to get it right every time; instead, you leaned into collaboration, transparency, and learning in real time. That honesty is rare. That mindset gives others permission to start somewhere, even if it's not perfect."

Leading Gothenburg's successful bid for the European Capital of Smart Tourism 2020 was a milestone. What did that experience teach you about aligning innovation, sustainability, and storytelling?

One of my strongest drivers has always been seeing sustainability as a catalyst for innovation. Solving sustainability challenges often requires entirely new ways of thinking and working. What that process, Capital of Smart, reinforced is how powerful it becomes when innovation is paired with storytelling. When you can turn solutions into narratives that people understand and connect with, you create momentum.

There are so many good things happening, so many solutions already out there. We just don't tell those stories enough. And without stories, even the best ideas struggle to scale.

What do you see as the main challenges for destinations striving to combine sustainability with tourism growth – and how is Gothenburg addressing those tensions?

A fundamental, but still surprisingly difficult, shift is realizing that sustainability and tourism growth are not opposites. On the contrary, long-term success depends on combining them. The real risk isn't growth, it's unbalanced growth. Destinations that focus only on volume often run into the same issues: overtourism, community resistance, pressure on infrastructure and natural resources. That's a short-term path with long-term consequences.

Sustainable growth is about balance, between visitors and residents, short-term business and long-term urban planning, economic value and environmental limits.

In Gothenburg, we try to reflect that by measuring and monitoring more than just guest nights. For example we track things like resident sentiment and tourism intensity, and we're increasingly involved in hyper-local place development where involving local community is a standard. Ultimately, it's about shifting the question from "how do we grow more?" to "how do we grow better?", "how do we create more value?"

Looking ahead, what are your priorities for Gothenburg's sustainability strategy and tourism governance? Any upcoming projects or shifts we should watch?

In uncertain and turbulent times, staying grounded in your values becomes even more important. For us, that means continuing along our path of sustainable destination development, with consistency and long-term commitment.

Questions of democracy, trust, and inclusion are fundamental. They are the foundations of a well-functioning society, and I strongly believe that tourism and destination organizations have a role to play, not only in safeguarding these values, but in helping to move them forward. With that in mind, we will continue to deepen our work with local place development, further increasing the involvement of residents and local communities in shaping the destination, and exploring how tourism can contribute more meaningfully at the neighbourhood level.

We're also very proud to have been appointed a UN Sustainable Lifestyle Hub, the only active hub globally, and a pilot initiative. It's a recognition of our ongoing work contributing to the UN Sustainable Development Goals. The purpose of the hub is to showcase local solutions to global challenges. For us, this is a platform for collaboration, locally, nationally, and globally, and an opportunity to share stories, exchange knowledge, and learn from each other. Because in the end, progress in this space depends on how well we learn from each other, and how quickly we turn ideas into action.



- 1. Ale
- 2. Alingsås
- 3. Göteborg
- 4. Härryda
- 5. Kungsbacka
- 6. Kungälv
- 7. Lerum
- 8. Lilla Edet
- 9. Mölndal
- 10. Partille
- 11. Stenungsund
- 12. Tjörn
- 13. Öckerö

WHAT GOTHENBURG DEMONSTRATES

What Gothenburg ultimately demonstrates is a model of destination development in which branding becomes almost invisible, experienced through consistency.

The city's reputation has not been built through spectacle or overstatement, but through long-term credibility. Recognition as one of the world's most sustainable destinations reflects decades of coordinated work rather than a campaign moment.

By prioritising collaboration over competition, and long-term responsibility over short-term display, Gothenburg has created a destination identity grounded in how it operates rather than how it promotes itself.

Openness, innovation and sustainability are civic systems: reflected in mobility, hospitality, public life and the everyday experience of moving through the city.

The result is a destination in constant progress: not because it promises change, but because it practices it.

A city improving the present, and in doing so, quietly shaping the future.

EXPERT VIEW

What strikes me about Gothenburg is how little it needs to explain itself. Sustainability is not presented as a choice; it is simply how the city works.

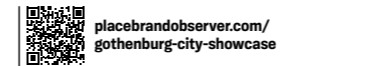
As a visitor, you don't opt in. You move through systems where sustainable options are already the default. That shift, from effort to ease, is what makes it convincing.

The same applies to hospitality. Certified hotels are not highlighted as exceptions, but treated as standard. It signals that sustainable practice has moved from ambition to operation.

From a communications perspective, this creates unusual clarity: the experience does the work. The city doesn't need to overstate what is already evident.

SASKIA RUTTKOWSKI
TOURISM SUSTAINABILITY COMMUNICATIONS
SPECIALIST, TPBO ASSOCIATE

EXPLORE THE ONLINE SHOWCASE



EXPLORE GOTHENBURG ONLINE



GRAUBÜNDEN

FROM ALPINE REGION TO COLLECTIVE IMPACT MODEL

In eastern Switzerland, bordering Italy, Austria and Liechtenstein, lies Graubünden: the country's largest canton by territory and one of its most distinctive. Known internationally for destinations such as St. Moritz and Davos, and domestically for its trilingual culture and alpine landscapes, Graubünden has long cultivated a strong regional identity.

For more than a decade, it has also been regarded as a quiet pioneer in Swiss place branding. While many regions relied on campaigns, Graubünden invested in continuity. Managed from the outset by Gieri Spescha and his team at Quant AG, and supported politically by the canton, the regional brand has been embraced by business and gradually embedded across sectors. This long-term consistency has become one of its defining characteristics.

Now, Graubünden is evolving again.

In response to climate adaptation, digital transformation, demographic change and increasing competition for talent, the canton has reframed its regional brand. No longer conceived primarily as a communication

platform, it is being developed into what the strategy defines as a *Wirkungsraum*, a space of collective impact.

The guiding question is straightforward: how can the brand be strengthened from within to unfold its full effect?

At the centre stands a clear vision: *Gemeinsam gestalten wir den besten Ort für gutes Leben*. Together, we shape the best place for living well.

The formulation shifts the emphasis from external perception to internal collaboration. The brand becomes less about projection and more about enabling shared responsibility among public authorities, businesses, cultural institutions and citizens. Visibility follows from coherence.

Three values articulate this orientation. Graubünden positions itself as *wahr*, grounded in lived alpine culture and linguistic diversity. As *wohltuend*, where quality of life is experienced in everyday life. And as *weitsichtig*, balancing ecological responsibility with economic and social resilience.

These principles reflect a region accustomed to long-term thinking. What distinguishes the current strategy is the clarity with which collaboration is organised.



A SYSTEM OF COLLECTIVE IMPACT

The *Wirkungsraum* model introduces a circular governance logic. The canton remains the formal brand owner, providing legitimacy and framework conditions. A strategic system board ensures direction and coherence. A coordination office supports dialogue across sectors, while thematic cooperation circles bring together actors to develop initiatives aligned with shared priorities.

Rather than relying on hierarchical steering, the model emphasises feedback, adaptability and collective learning. The region is understood as part of a broader environment shaped by political, economic and cultural dynamics. Resilience depends on the strength of relationships within this system.



FROM NARRATIVE TO STRUCTURE

This evolution builds on an existing narrative anchor: *NaturMetropole graubünden*. The concept expresses the ambition to reconcile nature and progress. Alpine landscapes are not positioned as a backdrop, but as a condition for innovation, entrepreneurship and cultural vitality.

NaturMetropole provides the shared narrative. The *Wirkungsraum* provides the enabling structure.

Implementation is incremental. The initial phase focuses on consolidating governance, clarifying roles and aligning existing initiatives within the collaborative framework. Programmes in culture, mobility and regional value creation are not replaced, but connected. Annual review processes support learning and transparency over time.

CONTINUITY AS STRATEGIC ADVANTAGE

For external observers, the significance lies in the trajectory rather than the terminology. Graubünden demonstrates how sustained political backing and business engagement can create the conditions for refinement rather than reinvention.

The region does not reposition itself; it builds on what exists.

This continuity enables a transition from brand as communication to brand as coordination mechanism, without losing clarity or recognition.

WHAT GRAUBÜNDEN DEMONSTRATES

Graubünden demonstrates how place branding can evolve into a form of governance infrastructure; a framework for collaboration that aligns ambition across sectors and over time.

Rather than relying on messaging alone, the region uses its brand to structure relationships, guide decision-making and support collective action. It becomes a reference point for how institutions, industries and communities move in the same direction, while maintaining their distinct roles and priorities. In this sense, the brand functions less as a communications tool and more as an organising principle, shaping how the region develops, invests and presents itself consistently.

This approach requires continuity. Alignment is not achieved in moments, but built through shared understanding, repeated application and institutional discipline. Over time, the brand becomes embedded in how decisions are made and how progress is measured.

The alpine context is specific, shaped by geography, scale and culture. Yet the underlying principle is transferable. Coherence is not achieved through campaigns, but through sustained alignment, where identity is continuously reinforced through practice rather than communication alone.

EXPERT VIEW

What is particularly notable in Graubünden is the progression from continuity to structure. The region has not treated place branding as a sequence of campaigns, but as an ongoing process that can be deepened over time.

The shift towards a Wirkungsraum is therefore not a reinvention, but a logical next step. It formalises something that was already present: the role of the brand as a connector between actors.

From an editorial perspective, this is where the case becomes especially relevant. It shows how long-term commitment creates the conditions for more advanced forms of coordination, moving from narrative to system without losing credibility.

DR FLORIAN KAEFER
PUBLISHER, THE PLACE BRAND OBSERVER

EXPLORE GRAUBÜNDEN ONLINE



naturmetropole.ch/en/graubuenden



GREATER COPENHAGEN REGION



To call Greater Copenhagen a place of high quality of life is to state the obvious. Denmark and Sweden regularly top life-quality rankings such as the World Happiness Report, celebrated for equitable societies, robust democracies and humane urban design.

In an increasingly competitive global landscape, Greater Copenhagen has been deliberate about how it positions itself. Rather than competing with global megacities on scale or spectacle, the region has leaned into what it knows best: balance, trust and everyday life quality. A deeply embedded welfare model, world-class universities, strong life-science and green-tech clusters, and a collaborative ecosystem spanning Denmark and southern Sweden form the backbone of this approach.

This strategy starts from a clear understanding that decisions about relocation, investment or career are rarely purely rational. They are emotional, personal and often risky.

The Greater Copenhagen Region has chosen to define its reputation not through aspiration, but through assurance. Rather than promoting a lifestyle it hopes to offer, the region has articulated a proposition it is prepared to stand behind: that quality of life here is not a promise, but a lived reality.

Greater Copenhagen's approach reflects a confidence often found in places that have refined their identity over decades — a willingness to be held accountable to their own narrative, and to risk critique in service of authenticity.

LIFE QUALITY INSURANCE

A CAMPAIGN AS A MEASURE OF CONFIDENCE

The Life Quality Insurance initiative is best understood as a revealing expression of how the Greater Copenhagen Region works. By offering a tangible guarantee linked to relocation, the region placed its reputation on the line.

In October 2024, Greater Copenhagen Region launched the world's first "Life Quality Insurance" — a campaign so confident in the lived reality of the place that it pledged support for those who might find it is not for them. If moving into the region, securing a job and living there for a year does not improve someone's quality of life, the campaign promised to help them return home. This idea — part guarantee, part invitation to risk-taking — reframes place branding from abstraction to action.

Rather than persuading through imagery or slogans, the initiative relied on proof: that the systems supporting work-life balance, access to nature, education, healthcare and mobility would stand up to scrutiny.

The campaign's strength lay not in creativity alone, but in the institutional confidence behind it — the confidence to make a promise grounded in lived reality

Greater Copenhagen's approach reflects a mature understanding of place reputation: that trust is built over time through consistency, not visibility. The campaign becomes a moment of articulation, not a departure from how the region operates.

A PROMISE THE WORLD RECOGNISED

- A promise that travelled to 93 countries
- Seen more than 450 million times
- Answered by 1,400 people ready to act
- Won a Silver Lion for PR Challenger Brand
- Gold at the Epica Awards in Public Services category
- Recognised from the Creative Circle and LIA Awards



WHAT MAKES THE PROMISE BELIEVABLE

The Life Quality Insurance narrative resonated because it reflected qualities already embedded in the Greater Copenhagen Region — lived, reinforced, and consistently delivered. These are not constructed brand claims, but attributes experienced in everyday life.

THE HUMAN CASE FOR BELONGING

At the core of Greater Copenhagen's appeal sits trust — in institutions, in public systems, and in one another. This trust reduces friction in daily life, creating a sense of ease that visitors notice and residents rely on.

For newcomers, it translates into psychological safety: the freedom to focus on work, family and personal growth without constant negotiation. Balance is equally central. Work and life are treated not as competing forces, but as shared priorities shaped by culture and policy alike.

Belonging here is open rather than prescriptive. Greater Copenhagen offers inclusion without demanding assimilation — space to live well while remaining oneself.

SYSTEMS THAT SUPPORT DAILY LIFE

These emotional assurances are underpinned by systems that work. Long-standing democratic foundations — transparency, institutional trust and a shared social contract — quietly sustain the region's quality of life.

The labour market is internationally connected and knowledge-driven, offering stability and opportunity across sectors from life sciences to green technology and digital industries. Infrastructure — transport, healthcare, childcare and education — is designed to be dependable rather than spectacular.

Housing, mobility and access to nature are integrated into a coherent urban rhythm. Cities are shaped for everyday use, allowing people to move fluidly between professional, cultural and personal spheres.

These qualities are not framed as exceptional. They are simply present — and it is this quiet reliability that gives the region's promise its credibility.



THE ARCHITECT OF AMBITION

ABOUT COPENHAGEN CAPACITY

Behind Greater Copenhagen's confident promise stands a quietly formidable organisation: Copenhagen Capacity. Operating as a not-for-profit foundation, it serves as the region's official engine for attracting international companies, investors and professional talent — a mandate that places it firmly beyond the realm of promotion alone.

Its strength lies in execution. Rooted in Denmark's democratic traditions of transparency, coordination and trust, Copenhagen Capacity connects strategy with delivery, aligning public institutions, private actors and regional priorities into a coherent offer. It ensures that ambition is matched by readiness — that talent pathways, business support and settlement services function as promised.

BEHIND THE SCENES

In conversation with **MARIA HARDENBERGER SVERKA**
Marketing Director at Copenhagen Capacity



This conversation explores how Copenhagen Capacity translates long term place branding strategy into operational governance. We focus on how credibility, collaboration and institutional structure shape the region's international positioning.

Maria, you live in southern Sweden and work in Copenhagen. How does that everyday cross-border reality shape how you think about the region?

As a Greek, living in southern Sweden and working in Copenhagen gives me a very concrete, first-hand experience and understanding of what Greater Copenhagen actually is: not two countries, but one everyday functional progressive region. Crossing the border is not a theoretical concept for me; it's part of my daily life. That perspective makes the region feel tangible, human, and credible.

Moving here has been the best decision of my life, and that personal experience fuels a strong desire to share what makes this region so special with the world and invite everyone to be part of it. It also reminds me that place branding only works when it reflects real life: not abstractions or political borders, but how people actually live, work, and feel in a place.

How do you approach positioning Greater Copenhagen in an increasingly competitive global landscape?

We approach it with creativity, boldness, and emotion. We know that relocating to a new country is not an easy decision, nor a purely rational one. It's emotional, risky, and deeply personal. Competing with global megacities on scale or spectacle would be unrealistic, so instead we focus on what truly sets us apart: everyday life quality and a welfare society.

With limited resources, we deliberately chose not to follow the traditional paid media playbook. Instead, we leaned into bold storytelling and PR-driven creativity that could cut through the noise and make Greater Copenhagen impossible to overlook.

One of your most recent campaigns, the Life Quality Insurance, made a very concrete promise around quality of life. How did you ensure that message was credible in practice?

Credibility was absolutely critical. The promise works because it is grounded in reality, but also because we were honest about the fact that Greater Copenhagen, while perfect for many, won't be the right fit for everyone.

INTERVIEW WITH MARIA HARDENBERGER SVERKA



Scandinavia has a long-established reputation for trust, strong welfare systems, and high quality of life, consistently supported by global rankings — but we didn't want to present that as a one-size-fits-all solution.

With the Life Quality Insurance, we deliberately gave people the benefit of the doubt and acknowledged that moving here is a deeply personal choice. We put our money where our mouth is by committing to our promise: if someone genuinely felt that life here wasn't right for them, we were prepared to help them return home.

Partnering with international expats who already live in the region added further authenticity and human proof. Their lived experiences made the message relatable, credible, and emotionally real: not aspirational marketing, but an honest invitation.

What did the campaign process reveal about collaboration and institutional culture across the region?

The process reinforced that while collaboration is essential, bold creativity also requires clarity in mandates and a shared appetite for risk. In complex regional constellations, not all institutions move at the same pace or with the same level of ambition. Having a more streamlined decision-making structure proved critical in allowing the idea to move forward and reach its full potential.

How do you see the relationship between place branding and long-term governance evolving?

Place branding and governance are becoming increasingly intertwined. A brand promise creates expectations and governance must be able to deliver on them over time. When branding is rooted in real policies, lived experience, and long-term vision, it becomes a strategic tool rather than a communication layer. For regions like Greater Copenhagen, this means aligning across multiple agendas such as talent attraction, welfare systems, infrastructure, sustainability goals and more, so the story we tell remains true tomorrow, not just today.

What are the biggest challenges the region is currently facing?

Geopolitical uncertainty and increasingly strict immigration rules are major challenges. Global competition for talent is intensifying at the same time as mobility becomes more complex. This makes it even more important to clearly articulate why moving here is worth the effort — because it undeniably takes effort — and to ensure that systems, services, and policies genuinely support international professionals once they arrive.

What do you see as Greater Copenhagen's strongest assets for attracting international talent today?

Our strongest asset is the combination of world-class professional opportunities and exceptional everyday life. The region offers cutting-edge research environments, innovative companies, and a strong start-up ecosystem.

But what truly differentiates us is what happens outside working hours. Safety, trust, work-life balance, access to nature, and social security are not "soft" benefits; they are decisive factors for global talent. Consistently high rankings in happiness and livability reinforce that this isn't just a narrative. It's a lived reality. It is my reality.

WHAT THE GREATER COPENHAGEN REGION DEMONSTRATES

Greater Copenhagen illustrates how place branding can move from persuasion to proof.

The Life Quality Insurance initiative was not bold because it was creative. It was bold because it exposed the region to scrutiny. By attaching a tangible commitment to quality of life, the campaign translated narrative into accountability.

This reflects a mature understanding of reputation. In Greater Copenhagen, branding does not attempt to compensate for structural weakness. It articulates structural strength: institutional trust, cross-border coordination, welfare infrastructure, and policy continuity.

The region competes not on spectacle, but on assurance.

In an era defined by geopolitical volatility and heightened risk sensitivity, stability and predictability become strategic assets. Talent decisions are emotional and personal, but they are also shaped by confidence in governance and systems that function.

Greater Copenhagen demonstrates that credibility is cumulative. It is built over decades through alignment between policy, culture, and delivery. Communication then becomes articulation, not exaggeration.

For place branding practitioners, the lesson is clear: the strongest campaigns reveal how a place already operates — and are backed by institutions capable of sustaining the promise long after the headlines fade.

EXPERT VIEW

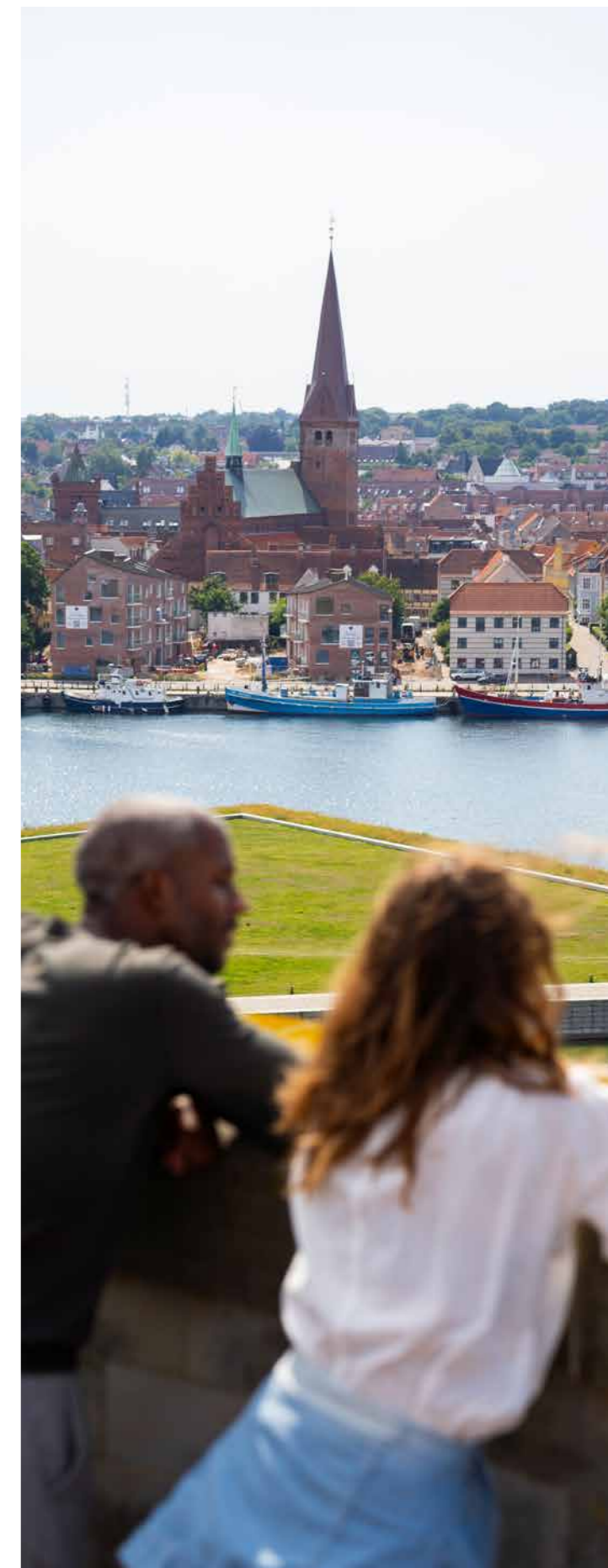
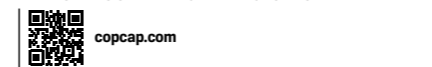
Copenhagen Capacity's work is continually impressive. They stand apart for their ability to combine strategic insight with creativity, using their place brand to solve real challenges facing the community. Initiatives such as the Life Quality Insurance concept show how a place brand can move beyond marketing into practical problem-solving. I love how they effortlessly translate the values of the place into a tangible invitation for talent and investment to experience the region for themselves. Where do I sign up?

JESSICA RADFORD
ACTING CEO, BRAND TASMANIA

EXPLORE THE ONLINE SHOWCASE



EXPLORE COPENHAGEN REGION ONLINE



LEEWARDEN

A CULTURAL MOMENTUM THAT CONTINUES

In the north of the Netherlands, Leeuwarden combines the character of a historic Frisian capital with a cultural scene that has gained increasing international attention in recent years. What distinguishes the city, however, is how culture has gradually become a strategic lens through which Leeuwarden presents itself to the world.

Its compact city centre — threaded with canals, markets and narrow streets — reflects centuries of trade, governance and regional identity. Today, these same spaces host a growing programme of festivals, exhibitions and cultural initiatives that position Leeuwarden not only as a cultural destination, but as a place where creativity shapes civic life and international perception.

For much of its history, Leeuwarden functioned primarily as the administrative and cultural centre of Friesland. In recent years, however, the city has begun to present itself more visibly on the international stage, emphasising culture, creativity and public space as defining elements of its identity.

This shift became particularly visible in 2018: a moment that would redefine how Leeuwarden understands the role of culture in shaping its future identity.

A CULTURAL TURNING POINT

In 2018, Leeuwarden-Fryslân was named European Capital of Culture. For a year, the province became a platform for artistic collaboration and civic participation, with more than 220 major cultural events and hundreds of community projects unfolding across the region.

The programme demonstrated how culture could operate at multiple levels simultaneously — from large-scale productions attracting international visitors to grassroots initiatives shaped by local communities. Public squares, historic buildings and unexpected locations became stages for artistic experimentation and dialogue.

Rather than allowing the title to remain a singular moment of international visibility, Leeuwarden treated the Capital of Culture year as the starting point of a longer cultural trajectory.

ARCADIA: EXTENDING THE LEGACY

Following the success of 2018, the city and its cultural partners established a long-term framework under the name Arcadia. Designed to extend the legacy of the Capital of Culture programme, Arcadia unfolds in three-year cycles leading toward 2028.

Each edition introduces new artistic interventions and public projects that activate both the city and the wider Frisian landscape.

The first edition in 2022 transformed Leeuwarden through Bosk, an installation in which more than 1,200 trees were temporarily planted throughout the urban centre. Streets and squares were reshaped into a temporary forest, inviting residents and visitors to experience the city from a different perspective.

In 2025, the programme returned with Bouwurk, a temporary cultural cathedral constructed at the foot of Leeuwarden's iconic Oldehove tower. The structure served as a gathering space for performances, conversations and artistic exchange, reinforcing the role of public space in the city's cultural life.

Through Arcadia, Leeuwarden has turned the momentum of 2018 into an ongoing rhythm of cultural production and civic participation — demonstrating how cultural programming can function as a long-term instrument of place identity and civic engagement.

A CITY SHAPED BY HISTORY

Leeuwarden's openness to cultural reinvention reflects a long and layered history. The city itself developed from three terp villages — artificial mounds built to protect settlements from flooding in the coastal landscape of Friesland.

For centuries the city was closely connected to the sea through the Middelzee estuary, which once provided an important trading route across the region. As the waters gradually receded and fertile clay land emerged, Leeuwarden developed into a regional centre of commerce, governance and court culture.

Remnants of this history remain visible throughout the city. Markets once located along waterways still shape the urban geography, while the Oldehove tower stands as one of Leeuwarden's most recognisable landmarks. Construction of the tower began in 1529 with ambitions to rival Groningen's Martini Tower, but the soft clay soil caused the structure to lean dramatically during construction. Although the church originally planned behind it was never completed, the unfinished tower has become an enduring symbol of the city.



CREATIVITY ACROSS GENERATIONS

Cultural expression has long been embedded in Leeuwarden's identity.

Contemporary culture is equally visible in Leeuwarden's streets and institutions. Since 2018, the city has gradually transformed into an open-air gallery, with murals appearing across building façades and industrial spaces.

The former prison complex Blokhuispoort has been reimagined as a creative hub for artists, entrepreneurs and cultural organisations. Festivals such as Into the Grave and Explore the North further illustrate the diversity of Leeuwarden's cultural landscape.

The city's designation as a UNESCO City of Literature since 2019 also reflects the importance of language, storytelling and spoken word in the region, where Frisian and Dutch cultural traditions continue to coexist.



A CITY IN TRANSITION

Leeuwarden today balances historical continuity with contemporary energy. Universities and knowledge institutions have strengthened the city's role as an educational centre, bringing a growing student population and new forms of cultural activity.

At the same time, initiatives such as the WaterCampus, Dairy Campus and Energy Campus highlight Leeuwarden's role as a centre for research and innovation.

Once associated primarily with its historical heritage, the city is increasingly recognised as a lively student city and cultural destination in the north of the Netherlands – a shift that reflects Leeuwarden's growing confidence in culture as a driver of identity, reputation and urban vitality.

WHAT LEEUWARDEN DEMONSTRATES

Leeuwarden demonstrates that the legacy of a cultural milestone becomes meaningful only when it evolves into an ongoing civic practice. Rather than allowing the European Capital of Culture title to remain a symbolic achievement, the city has continued to build on that moment through recurring cultural programmes and long-term collaboration.

Through initiatives such as Arcadia, Leeuwarden has translated a single year of international attention into a sustained framework for cultural activity, bringing together artists, institutions and communities in a shared process of creation and participation. Culture is not treated as a one-off event, but as a continuous mechanism for engagement and expression.

This continuity strengthens both internal and external perception. It reinforces a sense of civic confidence, while maintaining relevance beyond the initial spotlight. Cultural activity becomes embedded in how the city operates, rather than remaining an occasional highlight.

In doing so, Leeuwarden illustrates how smaller places can use culture not simply to attract visitors, but to shape identity, build long-term cohesion and sustain international presence over time.

EXPERT VIEW

A fascinating example of a city that, after being European Capital of Culture, continues to build on that momentum with a major cultural programme every two years, positioning itself as an attractive destination.

INGE VAN ROIJ
VENLO PARTNERS

EXPLORE LEEUWARDEN ONLINE



visitleeuwarden.com/en



LOS RÍOS

RESILIENCE IN THE RAINFOREST

SOUTHERN CHILE ALIGNING IDENTITY, INSTITUTIONS AND REGIONAL DEVELOPMENT

In a global landscape shaped by competition for visibility, many regions rely on amplification. Los Ríos, located in the heart of the Valdivian Temperate Rainforest in southern Chile, takes a more deliberate path. Its approach to identity and positioning is structured, intentional and system-led, aligning deep-rooted ancient identity with future-facing innovation.

While place branding is often associated with major capitals, Los Ríos offers a distinct blueprint. It demonstrates how a region can build international relevance through alignment rather than scale.



A TERRITORY SHAPED BY WATER AND TIME

Los Ríos begins with its conditions. Water is not a backdrop, but a defining force. As one of the rainiest regions in Latin America, its ecosystems, industries and urban forms are shaped by it. Rivers act as connectors, structuring mobility, culture and economic life.

This relationship extends into production. Craft beer, cider and broader food systems are directly linked to environmental conditions. What might elsewhere be seen as a constraint becomes here a source of distinctiveness.

The region also carries a deeper temporal dimension. Home to the Alerce Milenario, a 5,000-year-old tree, Los Ríos holds a living continuity between past and present. Indigenous knowledge and European heritage coexist within its cultural and architectural fabric, forming a layered identity rather than a singular narrative.

These conditions do not remain descriptive. They shape how the region functions and how it responds to disruption and change.



RESILIENCE AND COLLABORATIVE DISCIPLINE

The story of Los Ríos is one of profound resilience, a society that stood up from the debris to rebuild its future. The 1960 Valdivia earthquake, the most powerful ever recorded, remains a defining moment.

Its legacy is not only historical, but operational. It has fostered a distinct form of collaborative discipline, where coordination across sectors is embedded in how the region develops.

This is reflected in the way institutions interact. Public and private actors, academia and civil society operate within a shared framework, recognising that development and reputation cannot be advanced independently.



FROM IDENTITY TO POSITIONING

This foundation informs how Los Ríos understands and articulates itself.

Supported by Imagen de Chile, the region approaches place branding as a collective process. Public institutions, private sector actors, academia and civil society are brought together through consultation across municipalities.

Distinctiveness is not projected first, but developed through discussion, agreement and institutional trust. The region is not reduced to a single attribute. Its identity sits at the intersection of natural systems, cultural heritage, academic life and economic activity.

Valdivia plays a central role in making this identity visible. As capital, it translates regional character into an urban experience. Known as the "City of Wetlands," it reflects the region's defining relationship with water, shaping both landscape and everyday life.

Through this structure, distance from national centres becomes less a constraint and more a condition for clarity. Visibility is built through coherence rather than volume.



A SYSTEM LINKING KNOWLEDGE, ECONOMY AND REPUTATION

Los Ríos extends this alignment into its development model.

The region has developed a strong academic and scientific ecosystem, positioning itself as a hub for research and knowledge production. Often referred to as a "Silicon Forest," it reflects the convergence of biodiversity, ancestral knowledge and scientific advancement.

Traditional sectors such as shipbuilding and high-end dairy production operate alongside biotechnology and creative industries. In this context, remoteness becomes

an asset, enabling focus, depth and differentiation. The result is an environment where natural capital and innovation reinforce one another, supporting a model of sustainable development.

Within this system, reputation is treated as infrastructure. It shapes how the region is perceived by investors, students and partners, influencing its ability to attract long-term engagement.

By aligning identity, institutions and implementation, Los Ríos ensures that what is communicated reflects how the region operates. Place branding becomes an organising framework through which development priorities gain visibility and credibility.

WHAT LOS RÍOS DEMONSTRATES

Los Ríos demonstrates how place branding can function as a tool for regional development when approached as a long-term, cross-sector process rather than a promotional exercise.

By aligning public institutions, private sector actors, academia and civil society around a shared understanding of place, the region strengthens coherence between identity and projection. This alignment allows different sectors to contribute to a common direction, reinforcing both internal clarity and external credibility over time.

This reflects a broader shift in place branding, where credibility is shaped less by campaigns and more by the consistency between institutions, narrative and implementation. In this context, branding becomes less about visibility and more about coordination.

In doing so, Los Ríos shows that smaller and more distant territories are not constrained by scale, but enabled by clarity, collaboration and sustained strategic intent, allowing them to build relevance that is both distinctive and enduring.



EXPERT VIEW

Los Ríos region and its capital, Valdivia, offer a rare example in Latin America of a relatively small territory maintaining consistent focus on identity, brand and reputation as part of regional development.

The ongoing process, supported by Imagen de Chile, has brought together public and private sectors, academia and civil society through consultation and information-sharing across municipalities. This reflects a clear understanding that regional distinctiveness must be collectively defined and sustained over time.

By balancing multicultural history, nature, academia, tourism and sustainability, Los Ríos demonstrates how branding can support positioning and long-term development beyond major metropolitan centres.

ROSSANA DRESDNER
STRATEGIC COMMUNICATIONS CONSULTANT

EXPLORE LOS RÍOS ONLINE



corporacionlosrios.cl

SOUTH AFRICA

REFRAMING SOUTH AFRICA'S PROMISE

South Africa is never static. It is a country where glass towers rise beside heritage precincts, where one of the world's deepest capital markets trades against the rhythm of street markets, and where art galleries in Johannesburg or Cape Town speak as loudly about the future as the mines on the Highveld do about the past.

It is Africa's most industrialised economy — home to sophisticated financial services, diverse cultural exports, and world-class universities — while navigating the ongoing challenges of energy transition, governance renewal, and the high expectations that come with regional leadership.

This duality shapes the nation's brand. To understand South Africa's position, it is necessary to see it across multiple lenses: investment, mobility, policy, trade, culture, finance, governance and real estate. Each pillar tells its own story of resilience, volatility, ambition and recalibration.



POLICY & REGIONAL LEADERSHIP: PROJECTING STABILITY ON THE CONTINENTAL STAGE

South Africa's foreign and economic policy has long been anchored in regional leadership and multilateral engagement. Strategic partnerships with China, the European Union, and the United States, combined with active roles in BRICS and the African Union, give the country diplomatic weight few on the continent can match. Its current G20 Presidency underscores this position, placing African and Global South priorities on some of the world's most influential economic tables.

The policy direction is clear; strengthen global trade relations, deepen investment ties, and use instruments

such as the African Continental Free Trade Area (AfCFTA) to boost intra-African trade and industrialisation. The vision also includes advancing human rights and sustainable development, values that give the country credibility beyond commerce.

For the nation brand, the opportunity is to translate this diplomatic and economic capital into a narrative of reliability: a country whose leadership is not only historic, but forward-looking; not only influential, but strategically aligned with shared regional growth.



INVESTMENT: CONFIDENCE IN SEARCH OF CONSISTENCY

The numbers tell a compelling tale. South Africa remains one of the continent's top destinations for foreign direct investment, with global reputation scores for investment perception climbing from 3.02 to 3.28 in 2024, an 8.6% increase from Bloom Consulting's Global Reputation Study.

By 2025, growth steadied at 3.31 — signalling a phase of consolidation and renewed confidence. Investors remain actively engaged in sectors such as manufacturing, mining services, and logistics, drawn by South Africa's robust supply chains, skilled workforce, and unmatched continental connectivity. The fundamentals are solid: globally integrated automotive plants, world-leading mining expertise, and logistics corridors supported by major ports and airports. Ensuring consistency in energy, regulation, and investment frameworks continues to be key to sustaining this positive momentum and translating interest into long-term commitments.

South Africa's reputation as a hub for regional headquarters and industrial expansion remains strong, supported by its deep industrial base and growing investor confidence in its long-term potential.



MOBILITY: OPENING THE GATE

Flexibility is fast becoming a defining feature of successful place brands. In 2024, South Africa's Department of Home Affairs took decisive steps toward digitizing its immigration system through e-visas and e-permits, signalling a shift towards greater accessibility. Policymakers have proposed a points-based work visa and a dedicated remote-work visa, both intended to ease skilled migration and attract digital talent.

These reforms, set to be rolled out by late 2025, have the potential to address a long-standing reputational issue: perceptions among some African neighbours and global partners that South Africa's immigration processes are slow, unevenly applied, and difficult to navigate. The new Digital Visa System (ETA) promises fully online applications, real-time tracking, and the issuance of secure QR-coded visas accessible via smartphone wallets. Enhanced biometric and fraud-detection features are designed to strengthen trust while improving efficiency.

For South Africa's national brand, this is more than a bureaucratic upgrade. A fast, transparent and well-promoted e-visa regime, complemented by targeted remote work permits and streamlined skilled-worker channels can recast the country as open, agile and pro-business. It is a high-impact, relatively low-cost reputational win that positions South Africa as a more accessible gateway for talent, tourism and investment.



TRADE: BEYOND COMMODITIES

South Africa's export profile tells a story of breadth and resilience. Mining products such as platinum group metals and gold remain pillars, but the country also ships vehicles, machinery, chemicals and agricultural produce to markets around the world. Exports of goods and services account for roughly one-third of the GDP, underlining the economy's outward orientation.

Recent reputation data reinforces this strength. According to the Bloom Global Reputation Study, perceptions of South Africa's export performance have steadily improved: from 3.28 in 2022 to 3.48 in 2025 (+2.96%). African and Middle Eastern countries register the highest levels of confidence, reflecting the country's strong regional ties and trade leadership.

This leadership is visible across the continent through infrastructure development, AfCFTA integration, security cooperation, and active diplomatic engagement. Maintaining South Africa's image as a welcoming hub for African talent and innovation remains central to its positioning as a champion of inclusive growth and regional collaboration.

South Africa's major trading partners — China, the United States, Germany and Japan — underline its global reach. The next strategic horizon the country is pursuing focuses on advancing up the value chain — deepening beneficiation, expanding high-value manufacturing, and strengthening South Africa's position as a source of IT, professional, and knowledge-based services alongside its established resource sectors.

For the nation brand, the opportunity lies in projecting South Africa as a hub for regional value chains and skilled export services. It can shift perceptions from a resource exporter to a partner in innovation, production and knowledge.

COUNTRY OF ORIGIN EFFECT: CORPORATE BRANDS POWERING THE NATION BRAND

South Africa's trade narrative is strengthened not only by the diversity of its exports, but by the global reputation of its homegrown brands. In 2024, the nation brand was valued at USD 220 billion with 87% attributed to the strength of South African corporate brands (Brand Finance).

As the country leads the continent with 100 of Africa's 200 most valuable brands, sectors such as finance, retail, automotive and telecoms are acting as powerful ambassadors. These brands carry "Made in South Africa" into global markets — building trust, credibility and preference.

This corporate strength reinforces national positioning: shifting perception from a resource-based exporter to a hub of innovation, industrial capability and regional leadership. For the nation brand, it underscores a simple truth — strong companies build strong countries.

87%

OF SOUTH AFRICA'S NATION BRAND VALUE COMES FROM ITS CORPORATE SECTOR

CORPORATE BRAND CONTRIBUTION = THE VALUE GENERATED BY ALL PRODUCTS, SERVICES, AND BRANDS CONTRIBUTING TO GDP (BRAND FINANCE).

REAL ESTATE: OPPORTUNITY AMID CONSTRAINTS

South Africa's property landscape reflects a tale of contrasts. While certain segments in established urban centres show steady and localised growth; broader national trends remain shaped by economic headwinds.

For international investors and diaspora buyers, clarity is key. Transparent property ownership rules, clear taxation frameworks, and reliable municipal service delivery shape perceptions as much as pricing.

In promoting the nation brand globally, Brand South Africa highlights targeted incentives and transparent regulation for foreign investment in commercial and high-value residential real estate — particularly in gateway cities — as strong confidence builders. By emphasising clear ownership frameworks and accessible investment pathways, the approach appeals to both international and diaspora investors.



FINANCE: AFRICA'S CAPITAL MARKET & FINTECH HUB

Johannesburg's Stock Exchange (JSE) remains Africa's largest and one of the world's top 20 by market capitalization, anchoring a financial services ecosystem that spans banking, wealth management, insurance, and fintech with continental sophistication. Decades of institutional development have positioned Johannesburg as the financial nerve centre of the region, supporting multinational operations and enabling cross-border capital flows.

As fintech adoption accelerates across the continent, South Africa's capacity to innovate while offering stability places it in a strong position to shape Africa's financial future.

By marketing Johannesburg and the JSE as gateways to African capital markets, Brand South Africa is reinforcing a narrative of financial dynamism and continental integration; one where the country's capital markets not only serve global investors but also drive regional growth.



GOVERNANCE: BRIDGING THE PERCEPTION GAP

Perceptions of governance shape confidence as much as policy itself. South Africa sits mid-range on Transparency International's Corruption Perceptions Index, reflecting a system where solid institutions coexist with persistent challenges still to be addressed.

For global partners and investors alike, trust in governance is a decisive factor. Predictable rule of law, transparent procurement, and credible enforcement are the foundations of stability. Recognizing this, Brand South Africa has made governance performance a strategic communications priority — spotlighting institutional reforms, judicial milestones, and documented anti-corruption successes to narrow the gap between perception and reality.

Institutionally, South Africa aligns with international governance standards such as the African Peer Review Mechanism (APRM) and OECD best practices. The government's commitment to open governance, digital transformation, and service delivery improvement shows forward momentum. The South African Reserve Bank is highly respected globally for its independence and sound monetary policy. The National Treasury maintains robust fiscal management practices, often cited by rating agencies as a key institutional strength. The King IV Report on Corporate Governance is a globally recognized benchmark that influences governance standards beyond South Africa.

In its Regional and Global Leadership, South Africa plays a stabilising leadership role in Africa and global governance structures (AU, BRICS, G20, UN Security Council engagements). Its diplomatic and mediation efforts enhance its image as a responsible and influential actor — one that bridges African aspirations with global governance.

CULTURE & HERITAGE: THE SOFT POWER ENGINE

South Africa's cultural wealth is a force of quiet persuasion. From UNESCO heritage sites and historic routes to globally celebrated music, film and cuisine, the country holds a rare mix of depth and dynamism. Tourism figures show a steady rebound after the pandemic, with intra-African visitors continuing to anchor the market, drawn by both heritage and contemporary cultural life.

Culture is more than a backdrop; it is a strategic export and branding driver. Festivals, cultural diplomacy, and film and music production incentives are being harnessed to extend South Africa's creative reach and amplify its soft power. The results are measurable: the nation ranks 40th globally for culture in one 2024 study and 48th in the Good Country Index by Anholt & Co for Culture the year prior, reflecting a perception of South Africa as a distinctive, vibrant country with a strong geographic and cultural identity.

Nation brand campaigns have increasingly placed culture at the centre — not only to entice leisure tourists but to attract business travellers, enable creative collaborations, and strengthen ties with the diaspora. By weaving cultural expression into its global positioning, South Africa is signalling that its influence doesn't just lie in resources or policy — it thrives in stories, sounds and shared experiences.



AN ADMIRER NATION OF RESILIENCE AND RENAISSANCE

Despite its complexities, South Africa remains Africa's most admired nation brand. Ranked 34th globally by Brand Finance in 2024, its brand value grew by 23% to US\$216 billion, securing its place as the No. 1 nation brand in Sub-Saharan Africa and 41st on the Brand Finance Global Soft Power Index. In 2025, it was named Africa's most admired brand in the Brand Africa survey and inducted into the inaugural Brand Africa Hall of Fame.

These accolades don't mask the challenges — but they remind us of the fundamentals. South Africa continues to be the continent's reference point, setting benchmarks in culture, business, and diplomacy. The narrative is shifting beyond legacy sectors towards science, technology, and renewable energy, reflecting a dynamic, forward-looking identity.

South Africa's brand journey isn't simple, but it's compelling: a blend of resilience and ambition, cultural depth and economic strategy. The country — and Brand South Africa, the agency steering this intentional strategy — continues to set the pace for nation branding on the continent.



ABOUT BRAND SOUTH AFRICA

Over nearly 25 years, Brand South Africa has evolved from a marketing council into a strategic national actor, aligning government, business, civil society, and citizens around a shared vision.

Established in 2002 as the International Marketing Council and rebranded in 2011, it shifted the nation's brand promise from "Alive with Possibility" to "Inspiring New Ways", signalling a focus on innovation and inclusive transformation.

The agency's approach is both analytical and human-centred. Real-time sentiment tracking through the Global Reputation Study and the Domestic Perceptions Study enables Brand SA to act strategically, correcting misconceptions and spotlighting progress. Its grassroots Play Your Part initiative has mobilised

over 400 active citizen ambassadors, promoting positive change and shared responsibility across communities.

Confidence in the agency is rising: according to the FY2024/25 Stakeholder Survey, 80% of respondents are satisfied or highly satisfied with its work, and 76% rate its performance as good or excellent.

Brand South Africa also sees the private sector as a vital partner. Industry leaders are engaged as "economic diplomats," amplifying the national narrative through their brands.

Crucially, the agency recognises that storytelling must evolve. Beyond mining, tourism, and manufacturing, it is spotlighting progress in science, technology, and renewable energy to ensure South Africa remains relevant in a rapidly changing world.

WHAT SOUTH AFRICA DEMONSTRATES

South Africa demonstrates how national reputation is shaped not by a single narrative but by the ability to hold multiple identities together. The country's global image draws strength from contrast: cultural diversity, complex history, environmental richness and a vibrant civic landscape.

Rather than presenting a simplified story, South Africa's place brand reflects a society that continues to evolve in public view. Democratic institutions, cultural expression and economic ambition coexist with ongoing social challenges, creating a narrative that is dynamic rather than static.

This openness has become part of the country's soft power. For visitors, investors and partners, South Africa offers both authenticity and scale — a gateway to the African continent combined with a distinctive cultural voice on the global stage.

What emerges is a place brand rooted in resilience. The country's reputation is sustained not by perfection but by the visible effort to navigate complexity while continuing to contribute to global conversations on culture, sustainability and development.

EXPERT VIEW

Across the continent, I find myself consistently observing South Africa's approach. It stands out as one of the clearest examples of how a country can retain brand leadership even while navigating internal strain.

What makes its position endure is that the brand is not carried by one sector alone. Finance, culture, diplomacy, trade and corporate brands all reinforce one another. There is a depth to its institutional strength, paired with a cultural identity that gives it both character and resonance.

That balance is what makes South Africa's brand feel layered, credible and resilient, making it a relatable yet inspiring example for many countries across the continent.

NAFISA SHARFI
TPBO ASSOCIATE

EXPLORE THE ONLINE SHOWCASE



placebrandobserver.com/
south-africa-spotlight

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brandsouthafrica.com



SOUTH AUSTRALIA

A PLACE DEFINED BY THE ART OF LIVING WELL

South Australia does not assert itself loudly. Its distinctiveness lies less in scale or spectacle, and more in how life is organised and experienced. Work, culture and nature exist in closer balance. Success is defined less by accumulation than by quality of life.

In recent years, this way of living has been examined more deliberately. Not to redefine the State, but to understand what already exists and how it can be expressed more coherently.

What emerges is not a campaign, but a system. One that connects how South Australians live with how the State presents itself across tourism, trade, investment and education.

FROM LIVED VALUES TO SHARED DIRECTION

THE STARTING POINT WAS NOT POSITIONING, BUT OBSERVATION.

Research into everyday life across the State revealed a consistent pattern: a strong sense of belonging, a practical commitment to contribution and a preference for meaning over status.

These qualities shape how the place functions. There is an ease in interaction, a willingness to support ideas without overstatement and an emphasis on doing things well without needing to signal it. Progress is present, but rarely at the expense of balance.

This understanding was distilled into the SAMBA framework — Simple but Special, Abundant, Modern, Balanced and Accessible. Less a branding construct, it acts as a shorthand for how South Australia operates and can be expressed consistently.

HOLDING PROGRESS AND PRESERVING CHARACTER

SOUTH AUSTRALIA'S DEFINING CHARACTERISTIC IS HOW IT NAVIGATES CHANGE.

There is clear ambition for growth, alongside a strong instinct to protect what makes the place work: its pace, openness and quality of life.

Rather than resolving the tension between progress and preservation, the State manages it deliberately. Growth is framed as enhancement, not acceleration, and development is expected to contribute to quality of life.

A WAY OF LIFE AS A PROPOSITION

FOR VISITORS, THIS WAY OF LIFE BECOMES THE PRIMARY OFFER.

Food, wine, nature and culture are connected through a shared rhythm of ease and generosity. Experiences unfold rather than compete for attention.

What is offered is coherence; positioning South Australia as a place of balance, presence and restoration.





FROM PLACE BRAND TO DESTINATION EXPRESSION

THIS UNDERSTANDING IS CARRIED THROUGH INTO THE DESTINATION PLATFORM, CELEBRATE THE SIMPLE PLEASURES.

Rather than introducing a new narrative, it translates what already exists — expressing belonging, commitment and meaning through tone, pacing and storytelling.

The emphasis is on noticing rather than declaring. Everyday moments — a shared meal, time outdoors, a local encounter — become expressions of a way of life.

This creates continuity between identity and experience. The brand does not describe the place; it invites people into how it feels.



RELEVANCE IN AN AGE OF PERFORMANCE

This positioning gains clarity in a culture shaped by constant optimisation. Travel is often curated and accelerated rather than lived.

Against this backdrop, South Australia offers an alternative: a way of life grounded in balance, simplicity and human connection. Not as escape, but as a different mode of engagement.

Its relevance comes from alignment — not reacting to trends, but expressing qualities that already exist.

A CREATIVE PLATFORM, NOT JUST A CAMPAIGN

The creative approach extends this logic. It functions not simply as promotion, but as a platform that positions South Australia as a stage for its own creativity.

Its visual identity is an expression of character as much as communication. It is quietly confident, sensorial

and unmistakably South Australian. Developed in collaboration with local artists, filmmakers and makers, it draws on mixed media, handcrafted elements and layered compositions that feel authored rather than assembled.

Guided by Celebrate the Simple Pleasures, identity and campaign become inseparable. Each touchpoint, whether visual, narrative or spatial, carries the same intent to translate a way of life into something felt rather than described.

The system is designed to be both distinctive and open. It stands out within global tourism, while remaining flexible enough to act as a cultural stage that continuously showcases South Australian creativity across disciplines and formats.

In this way, the brand does not simply promote the destination. It expresses a philosophy centred on crafting a good life, and enables those who live it to shape how it is seen.

A DIFFERENT CREATIVE DISCIPLINE

The creative approach is deliberately restrained. Fewer declarations, more observation. Stories unfold through moments rather than sequences, allowing space for detail and human presence.

The platform functions as an ongoing system rather than a single campaign, evolving through multiple narratives over time.

South Australian artists, makers and storytellers play a central role in this process, ensuring that expression remains grounded in lived experience. This creates continuity between who tells the story and what the story represents.



COHERENCE AS A COMPETITIVE ADVANTAGE

What distinguishes South Australia is the alignment between its different layers.

The place brand defines how the State understands itself. The destination brand translates this into a clear external proposition. The creative approach expresses it consistently over time.

Each layer reinforces the next.

This creates coherence between identity, institutions and experience, an increasingly important condition in place branding. Rather than relying on amplification, South Australia builds distinction through consistency.



WHAT SOUTH AUSTRALIA DEMONSTRATES

South Australia demonstrates how place branding can evolve into a system of alignment between lived values, institutional frameworks and external expression.

By grounding its identity in how people live – their rhythms, priorities and definitions of value – and translating that consistently across tourism, strategy and creative execution, the State establishes coherence between internal character and external positioning. The brand becomes not a layer of communication, but a shared reference point that guides how different sectors operate, collaborate and present the place over time.

It reflects a broader shift in place branding. Competitive advantage is shaped less by how loudly a place speaks, and more by how clearly and consistently it aligns what it is with how it is experienced. In this sense, differentiation emerges not from amplification, but from the disciplined translation of identity into everyday practice.

EXPERT VIEW

What stands out in South Australia is the attempt to translate a way of life into something that can be applied consistently.

From experience, this is where many place brands struggle. The connection between internal character and external expression often breaks down. In South Australia's case, that connection is becoming more visible across how the State presents itself.

It suggests a shift from individual campaigns towards a more integrated approach, where narrative, experience and expression are increasingly aligned.

NATASHA GRAND
FOUNDER & DIRECTOR, INSTITUTE FOR IDENTITY (INSTID)

EXPLORE SOUTH AUSTRALIA ONLINE



southaustralia.com



SWEDEN



SPACE TO GROW: CLARIFYING A NATION BRAND

For decades, Sweden has occupied a distinctive place in the global imagination. Frequently associated with innovation, social trust and progressive governance, the country's reputation has been shaped as much by lived experience as by communication. In recent years, Sweden has taken a deliberate step to articulate this identity more clearly.

Rather than pursuing a dramatic repositioning, the country's latest nation brand strategy focuses on clarification. The intention is not to redefine how Sweden is perceived internationally, but to bring greater coherence to a reputation that already resonates across sectors such as innovation, sustainability, culture and entrepreneurship.

At the centre of the strategy sits a simple promise: Space to grow.

The phrase reflects a national condition shaped by democratic institutions, openness to new ideas and a longstanding culture of collaboration. For individuals, companies and communities alike, Sweden presents itself as a place where development is not only encouraged but structurally supported.

In a global environment increasingly marked by geopolitical uncertainty and competition for talent and investment, this framing positions Sweden as a society where freedom, trust and creativity form the foundation for long-term innovation.

DEMOCRACY AS THE FOUNDATION

The strategy is structured around a clear conceptual framework that connects Sweden's institutional foundations with its international positioning.

At its base lies the country's democratic tradition – transparency, participation and strong public institutions. These elements shape everyday life and create a stable environment in which ideas, businesses and cultural initiatives can develop over time.

From this foundation emerge three defining qualities: reliability, collaboration and creativity.

Together they describe how Sweden functions as a society. Reliability reflects institutional trust and predictable governance. Collaboration highlights the country's culture of partnership between public institutions, private companies and civil society. Creativity points to Sweden's capacity for experimentation and innovation across sectors ranging from technology and design to research and entrepreneurship. These qualities collectively support the national promise: space to grow.

In Sweden's case, innovation is therefore not presented simply as technological capability. It is framed as the outcome of social conditions that allow individuals and organisations to explore ideas freely, collaborate across boundaries and pursue long-term development.



A STRATEGY BUILT ON COLLABORATION

The development of the Brand Sweden strategy itself reflects this collaborative ethos. Led by the Swedish Institute together with the Brand Sweden Council, the process involved input from more than 300 representatives across business, academia, public agencies and regional organisations.

The council brings together a broad constellation of actors, including Business Sweden, Visit Sweden, Spotify, IKEA Sweden, Volvo Group, Lund University and the Stockholm School of Economics. Through this structure, the strategy connects sectors that together shape Sweden's international reputation.

Importantly, the framework is not intended as a centralised campaign or fixed set of messages.

Instead, it serves as a shared point of departure that organisations can adapt to their own markets, audiences and priorities. Trade promotion, tourism, innovation partnerships and cultural diplomacy may each communicate Sweden differently, but they remain connected through the same underlying narrative.

This approach reflects a growing understanding in nation branding: credibility emerges not from uniform messaging, but from alignment across institutions.

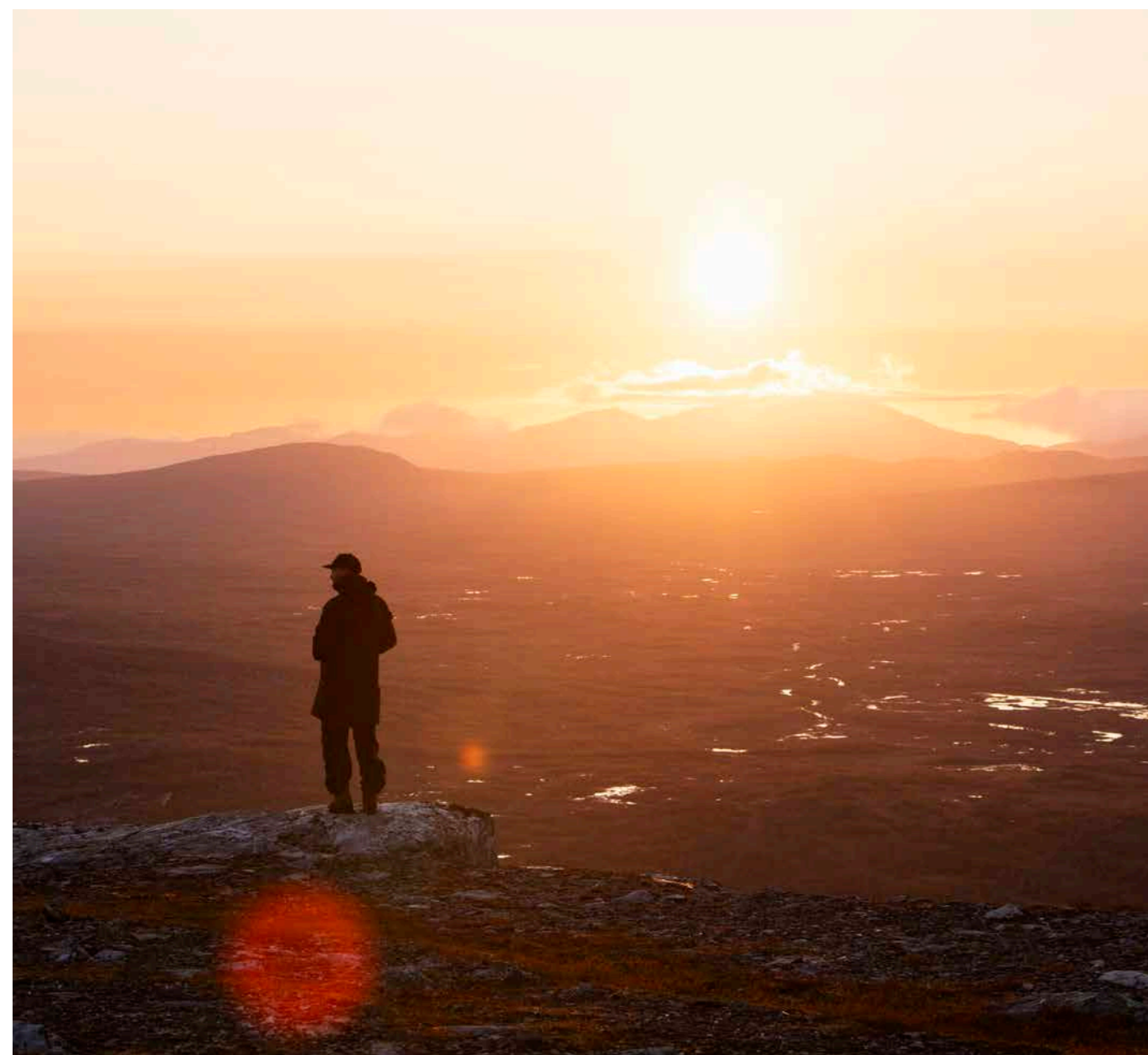


FROM STRATEGY TO IMPLEMENTATION

The current focus lies on implementation within Sweden itself. Government agencies, regions, businesses and cultural organisations are working to translate the strategy into practical tools that can guide how Sweden is presented internationally.

The ambition is not to produce a short-term promotional campaign, but to establish a durable framework capable of supporting Sweden's reputation over time.

For a country whose brand already travels widely, the challenge is less about visibility and more about coherence – ensuring that the many voices representing Sweden internationally tell a story that remains consistent, credible and grounded in lived reality.



WHAT SWEDEN DEMONSTRATES

Sweden demonstrates that strong nation brands rarely emerge from reinvention. More often, they result from the careful clarification of qualities that already exist within a society.

By articulating the relationship between democracy, trust and innovation, Sweden's strategy provides a framework that links national values with global competitiveness.

Rather than presenting innovation as an isolated achievement, the country frames it as the natural outcome of social conditions that allow people and organisations to develop freely.

In doing so, Sweden illustrates how nation branding can function less as a communication exercise and more as a shared narrative that aligns institutions, strengthens credibility and supports long-term reputation.

EXPERT VIEW

When we featured Sweden as the cover story of the Place Brand Leaders Yearbook 2025, the country was in the process of articulating a clearer strategic framework around those qualities. It is encouraging to see that work now moving into implementation, with institutions across Team Sweden aligning around a shared narrative.

The idea of "Space to grow" captures something fundamental about Sweden's global appeal. It reflects a society where democratic values, collaboration and creativity continue to shape not only how the country communicates internationally, but how it operates at home.

For practitioners of place branding, Sweden offers a reminder that strong nation brands rarely emerge from reinvention. They evolve through careful clarification and long-term institutional alignment.

DR FLORIAN KAEFER
PUBLISHER, THE PLACE BRAND OBSERVER

SWEDEN COVER STORY IN 2025 YEARBOOK



placebrandobserver.com/yearbook-2025

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THE BENTWAY

RECLAIMING INFRASTRUCTURE AS CIVIC SPACE

Beneath Toronto's Gardiner Expressway, a stretch of infrastructure long treated as residual has been reinterpreted as civic ground. Running along the underside of the elevated highway, The Bentway approaches the city as an evolving space rather than a fixed structure, using infrastructure as site, subject and canvas.

Rather than advancing a singular vision, this role is expressed through practice. Land once dismissed as infrastructural non-place is treated as an urban laboratory, testing how public life, culture and movement can coexist within dense city conditions.

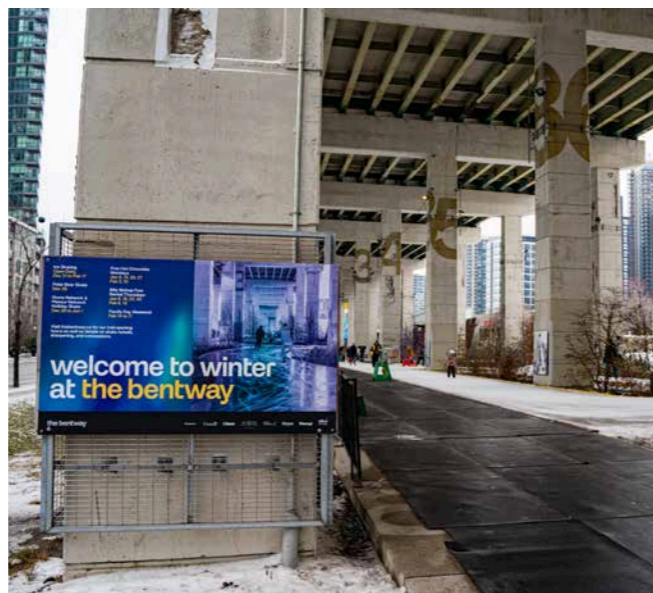
In many cities, infrastructure defines what cannot happen. Underpasses, rail corridors and highway edges often become fragmented and disconnected from everyday urban life. The Bentway takes the opposite view. Instead of treating the space beneath the Gardiner as leftover terrain, it positions it as an opportunity to extend the public realm within the existing city.

The project begins with a shift in perspective. Infrastructure is understood not only as a technical system, but as a spatial condition capable of hosting culture, movement and civic life.



INFRASTRUCTURE AS CIVIC GROUND

The Bentway functions less as a traditional park and more as a platform for experimentation. Rather than imposing a fixed design outcome, it enables multiple forms of use to emerge through programming, temporary installations and community engagement.



Seasonal events and cultural interventions activate the site throughout the year. In winter, a skating trail weaves between the expressway's concrete columns. In warmer months, the space hosts performances, exhibitions and neighbourhood gatherings. These uses transform a previously overlooked corridor into a shared civic environment where infrastructure and public life intersect.

What distinguishes the initiative is its use of experimentation as method. Instead of presenting a finished solution, the project advances incrementally, testing ideas through programming, design interventions and collaboration with artists, designers and civic partners.

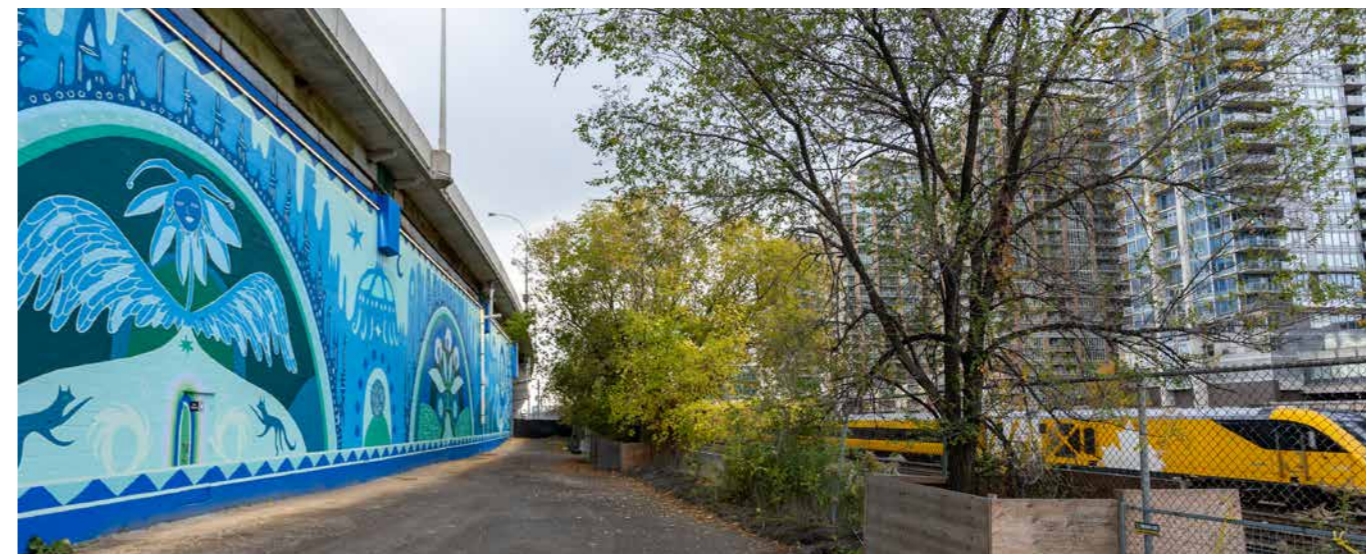
In this sense, The Bentway reflects a broader shift in city-making, where outcomes are shaped through coordinated practice rather than singular design gestures.

FROM IDEA TO CIVIC PRACTICE

Since opening its first phase in 2018, The Bentway has operated as an evolving framework rather than a completed destination. The project continues to expand along the expressway, extending both its physical footprint and its civic role.

Central to this evolution is institutional collaboration. Partnerships between the City of Toronto, philanthropic leadership, cultural organisations and urban designers ensure that the space is not only programmed, but actively stewarded. Cultural programming acts as connective tissue, sustaining the site over time and linking residents, artists and visitors within a shared urban setting.

This cross-sector alignment underpins the project's durability. Rather than relying on a single moment of development, it depends on ongoing coordination between cultural ambition, urban planning and civic stewardship.



EXPANDING THE URBAN IMAGINATION

The Bentway's relevance extends beyond Toronto. Cities globally face similar constraints as infrastructure ages and density increases. Elevated highways and rail corridors often divide neighbourhoods while leaving fragmented land beneath them.

The Bentway suggests an alternative approach. Instead of treating infrastructure as a barrier, it demonstrates how these structures can support new forms of civic space.

The project does not present a universal model. Each city operates within its own governance and spatial context. Instead, it offers a reference point for how overlooked conditions can be reinterpreted through collaboration, cultural programming and design.



WHAT THE BENTWAY DEMONSTRATES

The Bentway demonstrates how infrastructural space can be integrated into the civic realm through sustained collaboration and iterative development. What was once residual land beneath an elevated highway has been repositioned as a cultural corridor through an evolving framework of programming, design and long-term stewardship.

Rather than a single intervention, the project operates as a continuous process. Partnerships between public institutions, designers, cultural organisations and the community have allowed the space to adapt over time, responding to changing needs while maintaining a clear direction. This approach reinforces the idea that civic spaces are not static, but shaped through ongoing use and engagement.

It reflects a broader shift in urban practice. As spatial constraints intensify, the expansion of public space depends less on new land and more on reinterpreting existing conditions. Value is created not through addition, but through transformation.

The Bentway shows how infrastructure, when approached with coordination and imagination, can move beyond its functional role to become an active, connective component of urban life.

EXPERT VIEW

The Bentway illustrates how coordinated vision and sustained collaboration can transform overlooked infrastructure into meaningful civic space. Rather than relying on a single intervention, the project demonstrates how programming, stewardship and institutional alignment can redefine how public space is created and maintained in dense urban environments.

MICHAEL PERSSON GRIPKOW
STRATEGIST, AND SENIOR ADVISOR IN PLACE BRANDING



EXPLORE THE BENTWAY ONLINE



thebentway.ca

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PEOPLE TO WATCH

WHO IS SHAPING PLACE BRANDING TODAY

Around the world, individuals across policy, research and practice are redefining how places shape their reputation.

The individuals featured here have been nominated by the community for inclusion in this yearbook, joining The Place Brand Observer's Who's Who in Place Branding — a global network of over 500 peer-recognised professionals.

Among them are a city brand director shaping Tallinn's international positioning, a minister redefining how tourism and culture support national reputation, a researcher connecting place branding with innovation systems, and practitioners embedding identity in local regeneration.

What connects them is not a single approach, but a shared role in moving the field forward. Their work reflects how place branding is being redefined in practice.

Explore more profiles at: placebrandobserver.com/who-is-who

ABDOULIE JOBE

MINISTER OF TOURISM, ARTS AND CULTURE, THE GAMBIA

Abdoulie Jobe is overseeing a coordinated approach to national positioning built on policy alignment rather than isolated initiatives. The Gambia is introducing a new brand identity alongside a collaborative destination marketing framework and a broader investment promotion strategy. Named World's Best Minister 2026 by the World Government Summit in Dubai, his leadership reflects a shift towards coherence across tourism, culture and economic development — supporting the development of a more resilient and credible national narrative.

motc.gov.gm

ANDRES KASK

DIRECTOR OF INTERNATIONAL BUSINESS DEVELOPMENT & MARKETING OF CITY OF TALLINN

Andres Kask is leading Tallinn's transition from brand refresh to system-level repositioning. His work focuses on aligning how the city presents itself across tourism, investment, talent attraction and international cooperation. In a competitive European context, this reflects a move towards branding as strategic infrastructure rather than campaign activity. By prioritising coherence, internal alignment and long-term relevance, his approach positions brand as a coordinating mechanism across policy, economy and international engagement.

linkedin.com/in/andres-kask

GUIDO VAN GARDEREN

SENIOR MARKETING LECTURER, LSE + BRAND STRATEGY CONSULTANT

Guido van Garderen brings a commercially grounded perspective to place branding, applying frameworks from global corporate branding to destinations and regions. His work challenges the field to move beyond narrative towards structure, focusing on brand architecture, positioning and long-term value creation. At a time when destinations face increasing competition and scrutiny, his approach introduces greater discipline into how brands are built and governed. By bridging academic teaching and consulting practice, he is contributing to a shift towards more rigorous, performance-oriented place brand management.

linkedin.com/in/vangarderen

JACQUELYN WEST

CULTURAL INDUSTRIES STRATEGIST AND EDITOR, LET'S TALK ABOUT PLACEMAKING

Jacquelyn West plays a central role in shaping contemporary placemaking discourse. Through her editorial leadership, she has helped build a practitioner-led knowledge platform that elevates discussions around culture, equity and local agency. Her work reinforces placemaking as a strategic discipline rather than a set of tactical interventions. By curating and advancing critical conversations, she contributes to the intellectual infrastructure of the field, influencing how practitioners and policymakers understand place development.

linkedin.com/in/jacq-west

KLARA ENBOM BUREAU

BRAND MANAGER, KIRUNA MUNICIPALITY, SWEDEN

Klara Enbom Bureau is shaping how one of the most significant urban transformations is understood and communicated. As Kiruna undergoes relocation due to mining-related ground instability, her work frames the process not as loss but as continuity and future orientation. This positions place branding as part of long-term planning and cultural interpretation rather than promotion. By integrating heritage, Sámi culture and climate realities into a coherent narrative, her work reflects a deeper role for branding in meaning-making during structural change.

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KOBBY MENSAH

CEO, GHANA TOURISM DEVELOPMENT COMPANY (GTDC)

Kobby Mensah represents a convergence of academic insight and applied leadership in destination development. His move into leading GTDC signals a broader shift in Ghana's approach, positioning tourism as part of an integrated system connecting investment, innovation and experience design. Initiatives such as digital platforms for tourism investment and marketplace development reflect a move away from promotion towards infrastructure and ecosystem building as drivers of national reputation.

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MANOU NONNEKES

PLACE BRANDING STRATEGIST, NL BRANDING

Manou Nonnekkes contributes to how the Netherlands positions itself through collaboration rather than campaign-led communication. Her work focuses on building shared narratives and long-term credibility across stakeholders. Initiatives such as #NewDutch reflect an approach where national identity is treated as an evolving system shaped by culture and societal values. At a time when nation branding faces increasing scrutiny, her work represents a shift towards more participatory and values-based models of international positioning.

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MONICA RAY

PRESIDENT AND SOCIAL ENTREPRENEUR, CONGRESS HEIGHTS, WASHINGTON, DC

Ray exemplifies place leadership built on long-term commitment and community power. Working in Congress Heights in Washington, DC, she has transformed decades of organising experience into initiatives that show how under-invested communities can shape development on their own terms.

After ten years of advocacy, the city has approved the Soul of the City bid that Ray championed, recognising culture and identity as central to neighbourhood development. She also helped secure the Sycamore & Oak Retail Village to support local entrepreneurs, while advancing durable systems of empowerment through the BlackBone Project, which has supported over 1,000 Black women entrepreneurs, and the Kiongozi Leadership Collective. She also serves as lead architect of Prospering Places, focused on unlocking the potential of marginalised communities.

Her work is anchored in a clear mission: transforming vision into lasting change at the intersection of community, capital, and capacity.

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NABEELA FARIDA TUNIS

MINISTER OF TOURISM AND CULTURAL AFFAIRS, SIERRA LEONE

Nabeela Farida Tunis is advancing a structured approach to national reputation through sequenced policy development. Her leadership has progressed from ecotourism and domestic tourism awareness to a stronger focus on culture as a strategic pillar. This reflects an understanding of place branding as a function of governance and coherence rather than isolated campaigns. By aligning tourism, culture and national identity, with an emphasis on authenticity and community participation, her work positions Sierra Leone within a broader shift towards more integrated models of soft power.

This trajectory signals a mature understanding of place leadership, where governance quality and social inclusion is treated as a strategic pillar within a broader effort to strengthen national identity, credibility and international engagement.

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THERASA GARROD

DIRECTOR, THINKINGPLACE, UNITED KINGDOM

Therasa Garrod has demonstrated how place branding can operate as a tool for regeneration rather than image-making. In Bolsover, a former coal-mining area, she has helped develop a brand rooted in participation, narrative, honesty and long-term confidence-building.

Rather than distancing the place from its industrial past, the approach reframes it as a foundation for renewal. She has recently taken up a position as a place brand consultant at thinkingplace, supporting places to unlock their brand potential.

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VÍCTOR PALMA

DIRECTOR OF STRATEGIC PARTNERSHIPS, BRAND CHILE

Víctor Palma represents a long-term approach to place branding grounded in consistency and institutional alignment. Through initiatives such as Made by Chileans and his work with regional actors, he has focused on embedding brand thinking as a shared national capability. His approach connects a national narrative with regional execution, enabling local identities to develop distinct positioning while contributing to a broader country framework. This emphasis on continuity over campaigns reflects a more mature model of place brand governance, where coherence and coordination become central to credibility.

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VIRIYA TAECHARUNGROJ

ASSOCIATE PROFESSOR, MAHIDOL UNIVERSITY, THAILAND

Viriya Taecharungroj is helping reposition place branding as a measurable component of innovation systems and economic performance. His work moves beyond perception-led approaches, situating place identity within broader frameworks of soft power, innovation and competitiveness. Recent research spans social media analytics for city branding and the relationship between nation brands, soft power and economic outcomes, reflecting a shift toward evidence-based models of reputation. Alongside his academic work, his involvement in innovation management and intellectual property organisations connects theory with real-world systems, placing him at the intersection of research and applied policy.

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THE STATE OF PLACE BRANDING

PERSPECTIVES FROM PRACTITIONERS AND RESEARCHERS ON THE FORCES SHAPING PLACE IDENTITY AND REPUTATION TODAY.

Place branding continues to evolve as a field of practice, research and policy. Increasingly, places are judged not only by how they present themselves, but by what they deliver: governance, quality of life, sustainability performance and the lived experience of residents and visitors.

The following feature brings together

perspectives from The Place Brand Observer's global community of practitioners, researchers and advisors. Their reflections highlight how the discipline is shifting from image to evidence, from narrative to performance, and from communication alone to broader questions of coordination, resilience and long-term impact.

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THE STATE OF PLACE BRANDING 2026

FROM NARRATIVE TO EVIDENCE

Place branding is entering a more demanding phase. Across regions and sectors, reputation is increasingly shaped not by what places say, but by what people can experience, verify and trust.

Across the field of place branding, a structural shift is becoming increasingly visible.

For much of the past two decades, the discipline focused on narrative: defining identity, shaping perception, and communicating distinctiveness in a competitive global landscape. Branding strategies often centred on storytelling — translating a place's culture, values, and ambitions into messages designed to attract visitors, investors, talent, and partners.

Today, that model is evolving.

As geopolitical pressures intensify, technological change accelerates, and public expectations rise, places are being judged less by what they say and more by what they deliver. Reputation is increasingly formed through lived experience, policy decisions, and institutional credibility.

To explore how this transition is unfolding, The Place Brand Observer invited a global panel of practitioners, academics, and strategists to reflect on the forces shaping place branding in 2026. Their responses point to a field entering a more demanding phase — one where narrative alone is no longer enough.

FROM NARRATIVE TO EXECUTION

One of the clearest themes emerging from the panel reflections is the growing importance of execution.

Vision statements, slogans, and campaigns still play a role in shaping identity, but they no longer carry the same weight unless supported by tangible outcomes. Sustainability, resilience, inclusion, and governance are increasingly assessed through visible action rather than strategic language.

In this environment, the gap between promise and performance has become a reputational risk.

Places are evaluated through policies, infrastructure, and everyday lived reality — from housing and mobility systems to safety, public services, and institutional capacity. As Hong Fan notes, reputation is increasingly shaped by verified delivery, where claims about a place must be supported by measurable results.

This shift reflects a deeper transformation in the role of place branding itself. Rather than sitting alongside development strategies, branding is becoming inseparable from how places actually function.

EXPERIENCE AS THE BRAND

Closely linked to this shift is a redefinition of where branding takes place.

For many years, perception was largely shaped through promotional campaigns and media representation. Today, the primary channel through which places are evaluated is experience itself.

Public spaces, transport systems, housing accessibility, environmental quality, cultural life, and social cohesion all contribute directly to how people interpret a place's identity.

In this context, experience is no longer simply an outcome of branding; it has become its most credible form.

Brian T. Mullis points to a growing scepticism toward polished aesthetics and generic promotional content. Audiences increasingly prioritise authenticity and trust, assessing places not only on how they look but on how they function and for whom.

This reorientation also places residents at the centre of place branding strategies. Quality of life, belonging, and community well-being are no longer peripheral considerations but fundamental indicators of a place's credibility.

FROM IMAGE TO EVIDENCE

Another significant shift concerns the way places are evaluated.

Where perception once depended heavily on visibility, narrative coherence, or symbolic positioning, it is now increasingly shaped by evidence.

Data, rankings, benchmarks, and measurable indicators play a growing role in shaping how places are understood. Sustainability commitments, for example, are increasingly assessed through concrete practices and measurable outcomes rather than aspirational messaging.

Cecilia Pasquinelli notes that sustainability narratives are moving away from broad promises toward locally grounded practices that demonstrate impact. Similarly, Liisa Kokkarinen emphasises tourism's potential to generate net positive value — socially, culturally, and

environmentally — as a new benchmark for responsible place development.

This shift towards accountability reflects a broader recalibration: reputation is increasingly interpreted through outcomes rather than intention.

TECHNOLOGY AND NEW FILTERS OF PERCEPTION

Technology is accelerating these developments.

Artificial intelligence and algorithm-driven platforms are transforming how people discover, compare, and interpret places. Increasingly, audiences encounter places not through official narratives but through search results, digital assistants, review platforms, and aggregated datasets.

As Brian Mullis observes, the rise of AI-generated answers and zero-click research means that visibility may depend less on traditional website traffic and more on how structured and machine-readable information about a place is presented.

At the same time, generative technologies introduce new risks. Jibril Salifu highlights the potential for synthetic media and deepfakes to distort perception rapidly, damaging trust before institutions can respond.

In this environment, reputation management expands beyond storytelling. Monitoring, verification, and digital governance become essential components of place brand strategy.

POLITICS AND REPUTATION

Several contributors also point to a growing influence of political behaviour on how places are perceived.

Domestic policies, international actions, and governance decisions increasingly shape reputation more strongly than tourism campaigns or promotional narratives.

Rossana Dresdner notes that political behaviour is becoming a dominant factor in country perception, while Margareth Gustavo highlights the growing link between government decision-making and global reputation.

This reflects a broader geopolitical context in which audiences evaluate places through values-based lenses. Ethics, transparency, sustainability, and institutional quality remain central to soft power, even as global politics becomes more transactional.

As Fernando Prado Abuín observes, while hard power may dominate headlines, soft power continues to influence long-term preference and trust.

BELONGING AND INTERNAL PERCEPTION

Evaluation is also moving inward.

Beyond external perception, contributors increasingly highlight internal legitimacy as a crucial dimension of place reputation. Civic pride, stakeholder adoption, and alignment between strategy and lived experience are gaining importance as indicators of brand strength.

Jeremie Feinblatt points to the growing role of internal perception — including civic pride and regional coherence — as measures of success. Mark de Greeff similarly emphasises a shift from attractiveness toward belonging, where places are evaluated by whether people feel able to anchor themselves socially and culturally.

In this context, credibility emerges not only from external recognition but from internal alignment.

A place that appears successful yet feels disconnected from the lived reality of its residents risks being perceived as hollow or unstable.

RESEARCH AND PRACTICE CONVERGE

Alongside changes in practice, place branding research is evolving.

Recent academic discussions suggest that the field is entering a more mature phase. Long-standing debates around definition and legitimacy have not disappeared, but they no longer dominate the agenda. Instead, attention is shifting toward governance, impact, and interdisciplinary collaboration.

Several themes stand out.

Talent attraction is emerging as a core strategic focus, as places compete for skills in an increasingly mobile global workforce. Research emphasises the importance of aligning labour markets, urban policy, and international positioning to create environments where people not only move to but choose to stay.

At the same time, the geographical scope of place branding research is expanding. Rural and peripheral places are receiving greater attention, challenging the long-standing dominance of city-centred models.

Stakeholder engagement and co-creation also remain central topics. Increasingly, place brands are understood as collective processes shaped through participation rather than top-down communication.

Across these themes, one development stands out: the growing alignment between research and practice. Academic frameworks increasingly inform real-world strategies, while practitioners provide case studies and empirical insights that shape scholarly debate.

A FIELD ENTERING ITS ACCOUNTABILITY ERA

Taken together, the panel reflections suggest that place branding is entering what might be described as its accountability era.

The discipline is becoming less focused on communication alone and more integrated with governance, policy, and development. Reputation emerges not from narrative alone but from the interplay between identity, experience, and institutional credibility.

For place leaders, this transformation raises an important question.

The challenge is no longer simply how to tell a compelling story about a place. It is how to build a place whose reality supports the story being told.

In 2026, reputation belongs increasingly to those places able to align narrative with evidence — and ambition with delivery.

FROM THE RESEARCH DESK

WHERE ACADEMIA MEETS PRACTICE



OLGA RAUHUT KOMPANIETS

TPBO ASSOCIATE EDITOR, RESEARCH

Place branding research in 2026 feels different. Not louder, but more focused. After years spent debating its own legitimacy, the field is now getting on with the work.

That shift was clear at the 9th IPBA Conference in Manchester last October, which I attended on behalf of TPBO. It was the largest edition to date, with 150 delegates over three days, and a programme that moved easily between academic rigour and practitioner candour. Researchers and practitioners are increasingly speaking the same language. Governance, co-creation, talent attraction and the ethics of AI-assisted place branding and communication are no longer emerging themes; they form the agenda.

A publication that captures this moment well is the Elgar Encyclopedia of City and Place Branding, edited by Eduardo Oliveira, Efe Sevin and Emma Björner, with contributions from nearly 150 scholars and practitioners. I had the privilege of contributing to it, and what strikes me most is its honesty: the editors frame it not as a

closed canon, but as an open conversation, foundational rather than final. For those entering the field, or deepening their work within it, it is a reference that fills a notable gap.

The human question continues to resurface. As generative AI tools become embedded in how places monitor and communicate reputation, researchers are asking what might be lost. Authenticity, community voices and lived experience are not soft considerations; they are, as the field increasingly recognises, the foundations on which credible place brands are built. Whether this balance between efficiency and authenticity will hold remains an open question.

The next gathering to mark is Lisbon, 28 - 30 October 2026, for the 10th Anniversary IPBA Conference (see [Placebranding.org](https://placebranding.org)). A decade of this community coming together. There will be surprises, new ideas and, one expects, good coffee.

Olga Rauhut Kompaniets is Associate Professor in Business Administration at Halmstad University in Sweden, where she leads two programmes: the undergraduate in International Marketing and the master's in Responsible Global Marketing. She also serves as Associate Editor, Research, for The Place Brand Observer.

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BUILDING PLACE BRAND RESILIENCE IN A CHANGING WORLD

PARTNER PERSPECTIVE



KONRAD JAGODZINSKI

PLACE BRANDING DIRECTOR, BRAND FINANCE

The places featured in this Yearbook do not exist in isolation. Their reputations are shaped by forces far beyond their own communications: geopolitical shifts, global sentiment, and the measurable gap between what a place promises and what it delivers. Brand Finance's Global Soft Power Index 2026, the world's most comprehensive study of nation brand perception, surveying over 150,000 respondents across 100 markets, offers the analytical context within which any place branding strategy must be understood. Its findings this year are striking.

THE TRUMP EFFECT

The United States keeps 1st position in the Global Soft Power Index, with a score of 74.9 out of 100. However, it is experiencing a significant erosion of its soft power across all metrics except Familiarity, as President Donald Trump redefines the paradigms of America's engagement with the world.

The US records the sharpest decline out of all 193 nation brands in the entire ranking this year, down 4.6 points compared to last year. Perceptions of America's Reputation fall -11 ranks to 26th, and the nation records declines across multiple key drivers of Reputation, with the steepest ones in the People & Values pillar (-48 ranks), demonstrating how a misalignment between traditional expectations of America's nation brand and the new priorities of President Trump's second term are impacting the mood among global audiences.

It is difficult not to make a connection between some of the 'America First' policies and the negative turn of the US perceptions internationally: on immigration and travel as the US drops -32 ranks in friendliness to 156th – its lowest rank on any metric ever; transactionalism and unilateralism in international affairs and a drop of -50 ranks in good relations with other countries to 99th; reductions in foreign aid and a drop of -68 ranks in generosity to 98th; imposition of trade tariffs and a drop of -21 ranks from 5th to 26th in ease of doing business; withdrawal from the Paris agreement and a drop of -16 ranks from 2nd to 18th in support for climate action.

The radicalism of these shifts and the process of implementing new policies are likely to have contributed to a steep decline in perceptions of trust (-24 ranks to 57th) and an erosion across the Governance indicators, such as respect for law and human rights (-10 ranks), safety and security (-9 ranks), political stability and good governance (-8 ranks), and ethical standards and low corruption (-4 ranks). What is more, the results point to a negative knock-on effect even on objectively unrelated areas as US scores soften across all metrics in the survey except Familiarity.

Nevertheless, the US retains competitive dominance across multiple soft power domains. Hollywood, sporting excellence, top brands from Apple to Coca-Cola, elite

universities, Silicon Valley, and space missions all contribute to a global perception of the US as a hub of creativity, opportunity, and modernity. It maintains top positions in arts and entertainment (1st), sports (3rd), global brands (2nd), science (3rd), technology (3rd), and space exploration (1st).

Undoubtedly, some of its perceptual strengths are also reinforced by President Trump's ability to set the international agenda and consequently dominate the news cycle. The US continues to rank 1st for both Familiarity and Influence, and leads the rankings for the International Relations and Media & Communications pillars. It remains number #1 for influence in diplomacy, government leaders, influential media, and affairs I follow closely.

CHINA – A CREDIBLE ALTERNATIVE

With America's soft power eroding, China consolidates its 2nd position in the Index. As the only nation brand in the top 10 to increase its soft power score this year (+0.7 points up to 73.5), it has narrowed the gap to the US to less than 1.5 points. Over the last few years, China has worked effectively to not only reinforce core strengths but also address historical weaknesses. Its soft power gains are underpinned by a long-term, policy-led programme, from the Belt and Road investments, scientific and technological advancement, sustainability reforms, to building global product brands and facilitating cultural engagement.

Starting with relative weaknesses, China's Reputation has risen +9 ranks to 18th, overtaking that of the United States for the first time. This is supported by gains across key drivers of Reputation, such as People & Values (+22 ranks), Governance (+10 ranks), and Sustainable Future (+7 ranks), also in direct contrast to the trend of US results. While still ranking relatively low in many of the underlying nation brand attributes, China has made visible improvements on perceptions of friendliness (+27 ranks), fun (+18 ranks), ease of communication (+14 ranks), generosity (+14 ranks), and lifestyle appeal (+8 ranks). In total, China now ranks higher than the US on 19 out of the 35 nation brand attributes.

These improvements illustrate that audiences now engage with China not only as a strategic actor but

also as a country offering approachable experiences and cultural resonance. China's tourism perceptions have strengthened too, increasing +5 positions this year to 36th, reflecting a growing attraction of Chinese cities, heritage, and leisure opportunities, aided by visa facilitation programmes and people-to-people exchanges. Cultural phenomena such as Labubu, which gained global popularity in 2025, alongside strong recognition for brands like Huawei and Tik Tok, and the growing exports of electric vehicles, enhance China's reach further.

At the same time, China continues to consolidate its core strengths, systematically reinforcing perceptions in Business & Trade (+2 to 2nd) and Education & Science (+2 to 1st) where it projects credibility and reliability. It now ranks 1st globally for not only ease of doing business and future growth potential, but also technology and innovation, and advanced science. It has also risen to 3rd globally for perceptions of strong and stable economy (+5 ranks) – the single most influential driver of soft power among all the 35 nation brand attributes within the Global Soft Power Index.

By combining domestic development with structured international engagement, China is increasingly perceived as predictable, reliable, and capable of delivering tangible benefits, helping to sustain its high standing in Influence (2nd) and Familiarity (+1 to 4th).

A GLOBAL MOOD SHIFT

The Global Soft Power Index 2026 reveals a broader structural trend affecting nations worldwide: a widespread decline in international sentiment, reflecting a global mood shift driven by economic uncertainty, geopolitical tensions, and social pressures. This phenomenon is systemic rather than limited to individual countries. Across the survey, audiences are more cautious, less willing to express admiration, and more likely to scrutinise nations' behaviour, reflecting concerns about disruptive security crises, cost-of-living pressures, and speculation about an AI bubble on the stock markets. The mood shift is reminiscent of perception declines during the COVID-19 pandemic, when global audiences reassessed trust, governance, and alignment between values and action across the majority of nation brands.

The negative effect is compounded as the US, alongside the United Kingdom, Germany, and France, record sharper-than-average declines to their soft power scores. Ranked at the top of the Index, these nation brands have historically served as reference points to the survey respondents: their governance models, economic stability, and global engagement establish the benchmarks against which others are assessed. When audiences perceive these ranking leaders as underperforming, the reference point for soft power globally shifts downwards, creating a cascading deflation across all nation brands.

Looking beyond the ranking leaders, Western nations more generally account for a disproportionate share of the declines. Many are struggling to cope with the ripple effects of President Trump's new approach to European allies; many have to deal with issues of their own, as their governments are increasingly seen to underdeliver on long-standing brand promises of stability, prosperity, and moral leadership.

The United Kingdom exemplifies this dynamic, recording this year the entire ranking's second-steepest drop in soft power after the US (-3.2 points down to 69.2). Having already declined to 3rd place in 2025, the UK falls further to 4th in 2026 – its lowest position in the Index's history. Reputation crucially declines to 6th. While beyond substantial rank declines in the People & Values pillar, the UK largely retains its place on other metrics, its scores soften in all 35 nation brand attributes.

Although Familiarity (2nd) remains high, relevance is weakening. After six years of ranking 2nd, the UK now ranks 6th on the attribute affairs I follow closely, signalling a loss of its agenda-setting power. Against a backdrop of sustained underinvestment in the nation brand and soft power strategy, control over the UK's image is increasingly slipping away. Social media are dominated by persistent negative narratives fuelled by both genuine discontent as well as disinformation around post-Brexit trade frictions, migration pressures and backlash, alleged high crime rates, and supposed freedom of speech limitations, crowding out positive stories and reinforcing largely undeserved perceptions of Britain's twilight.

Similarly, the example of Germany (5th, -2.4 points down to 67.7) illustrates how economic and diplomatic credibility can erode simultaneously. It records its largest score declines on perceptions of a strong and stable economy (-0.7 points) as well as leadership in science (-0.8 points) and technology (-0.6 points), indicating that news of Germany's economic slowdown coupled with a less prominent role in the AI race are undermining its global standing. Steeper declines are also evident in perceptions of diplomatic influence (-0.7 points) and government leaders (-0.6 points), reflecting a transitional period as Chancellor Friedrich Merz, having taken office mid-year, has yet to establish the authority and stature once associated with Angela Merkel's international leadership.

A similar pattern is visible across several other Western nation brands, including: France (6th, = rank, -2.7 points), Canada (8th, -1 rank, -2.0 points), Sweden (13th, -2 ranks, -1.5 points), and Australia (16th, -2 ranks, -2.1 points).

Against this background, Switzerland (7th, +1 rank, -1.7 points) declines more slowly, enabling it to rise relative to peers despite overall softening. While it also records declines in line with the broader trend, its nation brand remains among the most resilient in the Index. This resilience is underpinned by exceptionally high Reputation, where it ranks 1st in the world, alongside top rankings for key drivers of Reputation, including trust, governance, and economic stability. Switzerland ranks number #1 on more metrics than any other nation brand in the Index, scoring 17 golds and topping the soft power medal table yet again this year. Together, these strengths allow Switzerland to hold its ground, illustrating how deeply embedded brand credibility can cushion against periods of global scepticism. This translates into tangible economic impact of soft power as Switzerland ranks either 1st or 2nd on all five dimensions of Recommendation which capture destination appeal across the key sectors of investment, trade, talent, education, and tourism.

STRATEGIES FOR NATION BRAND SUCCESS

In the current soft power landscape, characterised by widespread sentiment deflation and increasing scrutiny of nation brands, the capacity to maintain soft power is closely linked to adaptability and the strategic alignment of policy, impact, and narrative. Countries that hold ground amid declines do so by consciously consolidating strengths, maintaining credibility, and leveraging economic, diplomatic, and cultural assets to reinforce perceptions.

Japan is a good example of a nation brand focusing on building soft power through a direct experience of the nation brand. Although absolute score has softened slightly (-0.9 points to 70.6), Japan rises to 3rd place, overtaking the UK. Alongside established strengths in Business & Trade (1st), Sustainable Future (1st), Education & Science (2nd), and Governance (2nd), over the past year Japan has solidified perceptions across People & Values (1st, +2 ranks) and Culture & Heritage (3rd, +2 ranks) thanks to its growing popularity as a travel destination.

The tourism boom has seen Japan gain in Familiarity (6th, +1 rank) as well as related attributes such as great place to visit (8th, +3 ranks), appealing lifestyle (4th, +9 ranks), friendly (7th, +12 ranks), and fun (21st, +15 ranks). Understanding experiential drivers of soft power is as key as perceptual drivers for any nation brand strategy (see article in the Insights section).

Italy offers a complementary example of narrative alignment in a polarised media environment to sustain soft power. Among the top 10 nation brands in the Index, it records the smallest decline (9th, -0.8 points down to 61.6), reflecting an ability to shield its popularity from the storm by positioning itself in line with dominant global discourses.

Prime Minister Giorgia Meloni's right-wing government has proved adept at maintaining traditional alliances and partnerships, while engaging populist narratives that currently command disproportionate attention in international media, resonating with key audiences and influential figures, including aligning with the new US administration. This has helped Italy sustain relevance and limit reputational erosion despite broader declines among Western peers. Similarly, Argentina achieves its highest-ever ranking at 37th, a climb of +5 positions, the biggest gain among all the top 50 nations this year, reflecting the appeal of President Javier Milei's politics among key global audiences.

The United Arab Emirates, in turn, exemplifies a balanced strategy of persuasion through demonstrating impact and promoting engagement. The UAE retains 10th place overall with a score of 59.4, holding steady despite a minor adjustment of -1.0 point, while major Western nations in the top 10 see average declines of -2.5 points.

The nation brand defends or improves its ranks across all KPIs and pillars. It solidifies its Influence (8th) by connecting Europe, Asia, and Africa in both diplomatic and business terms, as illustrated by its strengths in International Relations (9th) and Business & Trade (10th). Communicating about progress towards energy transition and promoting immigration-friendly policies have helped

achieve notable +4 rank improvements for both the Sustainable Future and Governance pillars – key drivers of Reputation which in itself also saw an improvement (+1 rank). With that base, it comes as no surprise that the UAE now ranks as the world's 7th most preferred destination for investment.

Saudi Arabia (17th, +3 ranks) and Qatar (20th, +2 ranks) also perform strongly, growing soft power through proactive diplomacy, economic diversification, and new efforts across culture, tourism, and sports. Gulf nations illustrate that practical impact and proactive engagement are a recipe for success. This is true particularly in regions that experience volatility - as we have been all reminded by the outbreak of the US-Iran conflict in the past few months. While the Global Soft Power Index 2026 does not cover these recent developments, we will be looking at their impact on the global public opinion in the next iteration of the study going into field in the autumn of 2026.

Last but not least, South Korea provides a case study of effective investment in cultural salience in order to boost soft power. Rising to 11th place, the country offsets declines in Governance (25th, -5 ranks), linked to the recent constitutional crisis, with gains in Familiarity (15th, +2 ranks) and Influence (15th, +2 ranks), driven largely by globally successful content industries, including K-pop, K-dramas, and K-beauty.

Cultural salience has become a defensive asset, enabling nations to maintain visibility and affinity even when reputational indicators experience a temporary decline. In the case of South Korea, this is supported by significant government investments: KOCCA's annual budget exceeds \$400 million, complemented by the 2023 \$620 million support package for content, tourism, and language education, and the 2024 K-Content Fund of \$420 million. This level of commitment leaves no room for surprise at South Korea's leading positions in the arts and entertainment (7th) and influential media (7th) metrics.

KEY TAKEAWAYS

Geopolitical volatility is reshaping nation brand performance in real time. The US records the sharpest soft power decline of all 193 nations, while China narrows the gap to less than 1.5 points, driven by patient, policy-led investment across trade, science, culture and governance.

A global mood shift is underway. Audiences are more cautious and more likely to scrutinise national behaviour, creating a cascading deflation across nation brands that disproportionately affects Western nations.





















Resilience belongs to nations with deeply embedded credibility. Switzerland, Japan and the UAE hold ground not through visibility or scale, but through consistent alignment between values, policy and delivered outcomes.

Cultural salience is a defensive asset. South Korea demonstrates how investment in cultural engagement can offset reputational declines elsewhere, maintaining global affinity even during periods of domestic turbulence.

The core lesson for place leaders: soft power is not about promises. It is about the measurable gap between what a place says and what it delivers. Nations that close that gap gain ground. Those that widen it lose it, regardless of size or historic standing.

GLOBAL SOFT POWER INDEX TOP 20

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	1 =	United States		8 ▼	Canada		15 =	Netherlands
	74.9	79.5 -4.6		63.2	65.2 -2.0		57.8	58.7 -0.9
	2 =	China		9 =	Italy		16 ▼	Australia
	73.5	72.8 +0.7		61.6	62.4 -0.8		57.5	59.6 -2.1
	3 ▲	Japan		10 =	United Arab Emirates		17 ▲	Saudi Arabia
	70.6	71.5 -0.9		59.4	60.4 -1.0		55.9	55.6 +0.3
	4 ▼	United Kingdom		11 ▲	South Korea		18 =	Denmark
	69.2	72.4 -3.2		59.2	60.2 -1.0		55.6	56.5 -0.9
	5 =	Germany		12 ▲	Spain		19 ▼	Norway
	67.7	70.1 -2.4		58.9	59.7 -0.8		55.4	56.8 -1.4
	6 =	France		13 ▼	Sweden		20 ▲	Qatar
	65.8	68.5 -2.7		58.8	60.3 -1.5		54.9	54.5 +0.4
	7 ▲	Switzerland		14 ▲	Russia			
	63.2	64.9 -1.7		58.7	58.1 +0.6			

Konrad Jagodzinski leads Brand Finance's place branding and soft power practice, directing the annual Global Soft Power Index, Nation Brands, and City Index studies. He has advised leading place branding organisations including the GREAT Britain and Northern Ireland Campaign, New Zealand Story, and Cape Town Tourism, and brings extensive experience in place branding, public diplomacy, and strategic communications across both the private and public sectors.

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WHEN A NATION OUTGROWS ITS BRAND

PARTNER PERSPECTIVE



SHYAM VASUDEVAN

DIRECTOR & COO, IDEAWORKS

India's shift from unified identity to house of brands, and what it means for nation branding everywhere.

India is not a country that stands still. In 2026, it is the world's most populous nation, the fifth-largest economy, and the third-largest startup ecosystem on the planet, with over 159,000 startups employing more than 1.6 million people. From where I sit, having worked with several Indian states on their brand and investment strategies, what is happening here is not simply economic growth. It is a fundamental renegotiation of how a nation presents itself to the world.

The question at the centre of India's brand evolution is one I have worked with directly: does a nation pursue a single overarching identity, what brand strategists call a branded house, or does it let its parts speak for themselves, operating as a house of brands? For most nations, this is a strategic choice. For India, with 1.4 billion people, over 19,500 languages, 705 tribes and 36 states and union territories shaped largely along linguistic lines, it was never really a choice at all. Diversity is not a communications challenge to be managed. It is the condition from which any credible brand must be built.

India moved through this understanding in stages. "Incredible India" projected cultural richness and drew tourists effectively, but created friction when the country sought credibility in technology and global commerce. The prevailing image did not match the nation's growing expertise. The 2006 India Brand Equity Foundation addressed this directly, building a business narrative around scientific talent and expanding trade presence. Then in 2014, Invest India formalised what had been building for years: a federal-state partnership model in

which each state develops its own brand identity and competes independently for investment and talent. The shift from branded house to house of brands was now institutional.

Working with several states through this transition, I guided teams through SWOT-based brand processes, helping them identify genuine strengths, address weaknesses and build investment narratives around four pillars: growth, market, talent and opportunity. Seven states now pursue trillion-dollar growth strategies for 2030 to 2040. Every state has a startup hub. Social indicators and investment flows have improved alongside GDP growth.

Branding did not cause this alone. Governance, infrastructure, education and coordinated policy did the heavy lifting. But brand strategy provided the consistency and visibility that amplified those efforts, particularly at state level where the identity work was most specific and most credible.

The risks of this model are real. Regional brand competition can fragment the national message. Coordinating across 36 states is demanding work. It requires ongoing effort to ensure regional brands complement rather than undermine the national narrative. But the underlying logic holds: in a country defined by diversity, a brand strategy that respects and activates that diversity will outperform one that tries to contain it.

What India demonstrates, more clearly than almost any other case, is that nation branding works when it is built from political and cultural reality rather than imposed over it. The house of brands is not a compromise. When managed well, it is a competitive advantage.

Shyam Vasudevan is Director and COO of IdeaWorks, a communication design and brand strategy firm that has partnered with 22 place brands across 89 countries since 2006. Based in India, he has contributed directly to the brand strategies of several Indian states and brings a practitioner's perspective to how the world's most complex nation brand is evolving.

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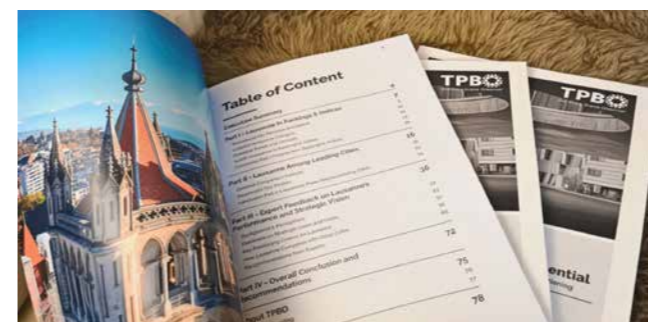
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