

WHO SHAPES THE IMAGE OF THE NETHERLANDS?

*An Analysis of the Stakeholders that Influence the Image of a
Country and the way this Process Takes Place, Especially in Regard
to the Creative Industries*

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Table of Contents

Table of Contents	2
Preface 3	
1 Introduction.....	5
1.1 Research Question	7
1.2 Objectives	7
2 Methods.....	9
2.1 Conceptual Framework.....	9
2.2 Exploratory Case Study	11
3 The Cultural or Creative Industries	12
3.1 The Notion of a Creative Economy	12
3.2 Defining the Creative industries	14
3.2.1 The Creative Industries Deployed as a Branding-tool: Cool Britannia	17
4 Conceptual Framework.....	20
4.1 Nation Branding.....	21
4.1.1 Nation Branding: A Contemporary Concept?.....	22
4.1.2 State versus Nation.....	23
4.1.3 Objectives of Nation Branding	25
4.1.4 Communicators of National Identity.....	26
4.1.5 Principles of Nation Branding.....	28
4.1.6 Effects of a Nation Branding Strategy	30
4.1.7 The Connection between Nation Branding and Nation Building	33
4.1.8 Nation Branding in Practice	36
4.2 Nation Branding Versus Product Branding	40
4.2.1 Product Branding	40
4.2.2 The Image of a Corporate Brand/ Product	42
4.2.3 A Country's Image as an Externality	46
4.3 Final Remarks Conceptual Framework	48
5 Nation Branding in the Netherlands and the Role of the Creative Industries	51
5.1 Nation Branding & City Branding in the Netherlands.....	52
5.2 Dutch International Cultural Policy & Creative Industries.....	55
5.2.1 Objectives.....	55
5.2.2 Stakeholders involved in International Cultural Policy in regard to the Creative Industries.....	56
5.2.3 Funding of Dutch Cultural Policy	58
5.3 Dutch Creative Industries & International Trade.....	59
5.3.1 Government Intervention into the Creative Industries; An Economic Perspective	59
5.3.2 Dutch Policy on International Trade.....	60
5.4 Creative Industries & Increase of Tourism in the Netherlands.....	65
5.5 Nation Branding in the Netherlands; A Stakeholders Analysis.....	66
6 Conclusion	70
Bibliography	79

Preface

This thesis was literally a quest. Point of departure was my curiosity for the role of the arts in general and the creative industries in particular, in shaping the image of a country. The Dutch government embraces the creative industries as a vehicle for Dutch culture and values, with the aim to establish or perpetuate a positive image of the country. It can be questioned how effective that is. The current situation in the Netherlands with respect to nation branding is that there is no central policy; all cities, regions, and organizations apply their own vision on how they aim to present themselves abroad.

The first outline of the thesis suggested a measurement of effect of a cultural event. An example is the celebration of 400 years New York. The method would involve the data collected by a major consultancy agency, by means of a globally conducted survey, on how the image of certain countries is perceived. With this Anholt-GfK Roper Nation Brand Index (Anholt, 2009) a change of attitude could be observed of such a large event. However, soon it became apparent that cause and effect could not be separated. Although I had to rephrase my research question and methods, I also found out that nation branding is the field of study that is concerned with how the image of countries comes about, and how this can be influenced.

The difficulty with this field of nation branding is the complexity of the matter. While conducting my literature review many times I had the feeling to have found the key to my research topic, but the more I read the further away I seemed to be. The following issues with nation branding became apparent. Firstly, theory on nation branding is underdeveloped as it is a fairly new field of study. Although there is growing attention to 'branding' countries, there is not much knowledge yet about the way the image of a country comes about. Also, what has been written comes from the consultancy sector, which in general is

focused on how to implement the concept instead of explaining why and how it exactly comes about. The result is that many assumptions have been made, often based on practical experience of the authors and common sense, but in most cases statements lack rationales. In addition, although authors agree on some points, they contradict each other on other aspects. Secondly, nation branding appears to be a very intangible concept. On the one hand this is because it has common ground with many topics, but nation branding itself is hardly an ultimate goal of activities. In addition, the image of a country is created by many factors, and most of all as an unintended side effect of transactions on the market. Examples are international trade, development of sectors, international cultural policy, and tourism. On the other hand, although nation branding is visible everywhere and mentioned by many policy makers, it seems that no one really implements a consistent policy on this matter.

Another point of interest is that it could be questioned how effective the attempts of shaping a nation's image are, as it comes about rather slowly. Also the existing image is by and large being shaped without intervention of the authorities. Also the existing preconceptions are rather persistent. Nevertheless there is growing attention of governments to actively attempt shaping its country's image. Yet, measuring the effect of such activities is quite complex. On the one hand this is because there is not one clear-cut definition of what an image is, nor about the way this is exactly being perceived. On the other hand, measuring the effects of nation branding activities is quite challenging as changes come about slowly (up to 20 years (Anholt, 2008, p. 3)). Also determining causality between undertaken activities and a change of image is difficult as many factors are involved.

1 Introduction

One of the things I have been fascinated by for quite some time is the claim that the cultural sector generates economic surplus. For instance the Rijksmuseum in Amsterdam argues that government support to the museum should be seen as an investment, as it draws tourists to Amsterdam who also spent much money elsewhere in the city. When the economic value of culture is so much stressed, it is almost like the cultural values do not matter so much anymore. Of course it is true that the value of cultural products (either economic, social or cultural value) are almost impossible to measure. Yet, to an increasing extent an attempt is made to quantify these values in order to provide a justification for public support. Not only policy makers make use of this practice. Cultural organizations are increasingly required to give account for the reason of their existence; simply stating that the arts have intrinsic value is not accepted anymore. As cultural values cannot be quantified, often the economic value is stressed. Although both types of value are almost impossible to measure, the advantage of economic value is that it can be captured in figures regardless how accurate measurements are. An example can be taken from the organization of a major sports event, like the Olympic Games. Instead of stating that hosting such an event provides the opportunity for many people to enjoy the event, it is claimed that it should be seen as an investment, which pays itself back by means of increased tourism and business opportunities. This approach causes friction, as it might lead to it that the economic values are too much stressed while the cultural values might be pushed to the background. In addition, it sometimes appears to me that an economic impact is claimed without any foundation.

Although this process of 'economification' does not only take place in the arts and sports, it is quite striking this is especially practiced in regard to the cultural or creative industries. Since a few years these sectors are in the

spotlight. Whereas the existence of the arts is increasingly justified by the existence of economic spillovers, the claim on the economic impact of the creative industries goes one step further as creativity and innovation are considered to be one of the new engines behind the development of our economy.

Another curiosity is the fact that branding theory is applied not only on products, but also people and even countries. Branding has never been as popular as it is now, and to an increasing extent branding is being applied to new fields. For instance, nowadays people, and especially students who are about to enter the job market, are told that they should work on their 'personal brand'. The same applies to countries, of which it is often argued that it is important to develop their image. Increasingly countries actively make an effort to shape the way they are conceived abroad. The reason for this is to change or confirm the current image, in order to increase tourism and international cooperation, or to create a positive business climate.

In this process of nation branding a large role is designated to the cultural sector. For instance, one key objective of international cultural policy of the Netherlands is to strengthen the reputation of the country abroad. It is believed that art is a method to profile 'BV Nederland' or 'the Netherlands Inc', as progressive, innovative and open-minded. An example is the celebration of the founding of New Amsterdam/ New York 400 years ago. In this respect it is argued that investment to art on an international level generates not only cultural value, but economic value as well. I am intrigued by the question what these economic values or externalities are, and whether they are under- or overrated. Not only on a macroeconomic level there is a growing attention to branding. Also on an individual level among artists there is a growing consciousness of brands. Examples are Andy Warhol and Billy Apple, who made a strong relation between their work and their personal identity. Also Dutch fashion designers Victor & Rolf are very much aware of the image they create with their different activities, and the close connection that exists between the fashion they create and their personal identity.

Interestingly, the above-mentioned developments go together. The creative industries are not only considered to be (one of the) thriving forces behind economic development, they are also said to make an excellent

branding tool for countries. Yet, it seems that it is believed that a country's image can be imposed as if it is a consumer product that is introduced on the market. It might be questioned whether this is really the case. Plainly, I am rather skeptical about the claim on the economic spillovers of the creative industries, as well as the application of nation branding, and especially the combination of these two. This paper therefore aims to provide insight into the way nation branding takes place, especially in the Netherlands, and what or who influences the way a country is conceived abroad.

1.1 Research Question

Who shapes the image of a country, in particular in the Netherlands, and how does this process take place, especially in regard to the creative industries?

Sub questions

- How does the image of a country come about, and what is nation branding?
- What activities does the Netherlands undertake with the aim to perpetuate or establish the Dutch image abroad?
- What stakeholders are directly as well as indirectly involved in the Netherlands in shaping the image of a country, specifically in regard to the creative industries?

1.2 Objectives

The objective of this research is twofold. In the first place the research aims to improve and expand the existing theory on nation branding, and gain a better understanding about the way a country is being perceived and the factors that influence this perception. Secondly, the objective is to explore the role of the creative industries as vehicle of a country's image, and to what extent this image comes about unintentionally by means of activities on the market or as a result of a branding strategy. The question is to what extent government

intervention lead to activities that otherwise would not have been realized.

2 Methods

As there is yet little known about the process of branding countries, this paper involves an exploratory research with a constructivist approach as point of departure. The focus will be on developing ideas about the process of nation branding and gathering information on how this concept is dealt with in practice. Since the theoretical basis is rather slim, a quantitative strategy is most appropriate. As image and identity are typical concepts that are not the result of objective observations, but instead constructed on basis of individual experiences and social interaction, a constructivist viewpoint is chosen.

The research will be conducted by means of a holistic multiple-case study at which the unit of analysis is the policy of the Dutch government in regard to nation branding and the creative industries. A case study has the advantage over statistical research, in that it is possible to sharpen existing theory. Instead of only approving or rejecting a hypothesis, a case study might also reveal the weak spots in the theory. The case study mainly involves analyses of secondary data.

In order to take account for construct validity Yin (2008, pp. 33-35) suggests using several sources to collect data. In order to construct external validity the research relies on analytical generalization, at which the case study serves as a test of the theory. Internal validity does not have to be accounted for, as this is only a concern for explanatory or causal studies.

2.1 Conceptual Framework

The main challenge of this thesis is to analyze how a country's image comes about, and how it might be influenced. As the execution of policy is rather

scattered, it is relevant to see how central policy is conveyed in practical implementation. The first half of the thesis sets out a conceptual framework on the image of a country. The aim is to gain understanding of the concept. The research attempts to address nation branding from a new angle. It goes back to the roots of nation branding, which is the field of marketing and branding theory. Skinner and Kubacki (2007), who made an inventory of the current situation on nation branding, conclude that place branding is a complex matter, as there are many stakeholders and connections involved. Until now marketing tools have been employed to approach the branding of places. The authors question however how suitable these methods are for the marketing of a country, as this process is rather different from branding a product. The authors argue therefore that further research should be conducted on the matter. To fill this gap of knowledge this paper aims to investigate what the characteristics of a country are in relation to the way an image of a country comes about and is communicated. The resemblance of branding a nation and branding a product is taken as a point of departure. Although it is said that nation branding has much in common with the process of branding of an ordinary good, there might also be many adjective differences, as the characteristics of a country are different from other goods. By gaining an understanding on the differences and similarities of the image of a country and that of an ordinary product, the knowledge about the process of establishing a positive image of a country will be increased.

Section one provides an introduction on the creative industries. Among other things this section addresses definitions of the creative industries. It also explores where the claim comes from that the creative industries generate externalities in general, and especially to the image of a country. The following section addresses the question how the image of a country comes about, and what is nation branding is. Section three develops the differences and similarities between branding countries and products. The characteristics of brands and countries will be analyzed analogously. The aim is to discover to what extent insights from the field of marketing/ branding can be applied to countries, in regard to the process of branding countries.

The conceptual framework addresses the following questions:

- What sectors are indicated as the creative industries?
- What is nation branding?
- What are the differences and similarities between branding products and countries?

2.2 Exploratory Case Study

The second half of the thesis explores activities that are regarded as nation branding, the role of the government in this process, and the challenges involved. It focuses on the activities the Dutch government undertakes with the aim to perpetuate or establish the Dutch image abroad in regard to the creative industries. The conceptual framework developed to provide understanding of the process of nation branding, delivers input to link practice with theory.

An analysis of policy documents will be used to address the following questions:

- How does the Dutch government address the concept of nation branding in regard to the creative industries?
- What are the objectives of nation branding theory of Dutch authorities with respect to the creative industries?
- What activities does the Netherlands undertake with the aim to perpetuate or establish the Dutch image abroad?
- What is the role of the creative industries in the process of establishing a nation's image?
- To what extent is the image of a country fostered by government interference?

3 The Cultural or Creative Industries

3.1 The Notion of a Creative Economy

Many terms were brought up to define the changes over the past century. Examples are post-industrial society, information economy, network society, digital age, knowledge society, service economy, and creative economy. Many of these terms are closely connected and often even have an overlap in meaning. Also the term information revolution can be found, as a counterpart of the industrial revolution. In essence two major changes can be defined. First, the industrial revolution marks a significant change from manual labor to a production process that became partly mechanized. Second, the informational society, often also referred to as the post-industrial society, denotes a change from production and material goods, to knowledge-based production (Webster, 2002, pp. 12-22).

Many of the above-mentioned 'eras' are subcategories within the information society. Examples are the network society, digital age, knowledge economy, and service economy. The difference between these categories is the emphasis that is put on aspects. For instance the digital age denotes the influence of digitalization on technological, social, spatial, occupational change, and economic development. Service economy emphasizes the shift that came about from a product-oriented economy, to a society that is mainly concerned with added value and services. The network society represents the changes globalization had on the way people communicate over distance. Noticeably there is an overlap between these developments. For instance, since the 1970s technological change made it easier to share information. An example is the development of PCs and digital information carrier. At the same time the economic significance of information increased exponentially, and the number of jobs involved in information-based sectors were boosted as well. The 1980s

and '90s can be regarded as the digital age. Although computers had been invented much earlier, the use of it, in combination with The Internet, became widespread in this period. Now it is often said we live in a network society, at which social media networks play a large role in keeping in touch with social contacts. Although a chronological categorization can be made, the beginning of a new era often does not mean an entire break with the past.

The digital age has in common with the age of the creative economy, that there was a rocklike faith in the new developments. The IT sector was believed to be the new thriving force behind the economy, and although the impact was (and still is) indeed considerable, the collapse of the dotcom-bubble shows that this unconditional belief was perhaps a bit misplaced. This process has much in common with the way the creative industries are treated at this moment. It seems now that 'creativity' and 'innovation' are the new words of fashion. Although the idea behind the creative economy sounds very convincing at the moment, within a decade the notion of the creative economy will most likely be overtaken by other developments. Also, the idea that the sectors indicated as creative industries contribute to economic development is not a new concept. Dr Machlup, a notable Austrian-American economist, introduced the notion of the knowledge economy in the 1960's. The knowledge economy involves those industries that are predominant for the changes within the information society. Examples are education, research and development, mass media, information technologies, and information services (Drucker, 1992, p. 263). Strikingly, this categorization does not differ much from that of the creative economy. It is argued that economic development is fostered by the so-called creative class, which is thought to consist of arts, culture, engineering, entertainment, science and the knowledge-based professions of finance, education management, law, and healthcare (Florida, Mellander, & Stolarick, 2008, pp. 1-2). This shows that the idea of creativity as the engine behind the economy is not as new as one would expect on basis of the large attention that is being paid to the concept.

3.2 Defining the Creative industries

The government of the United Kingdom was the first in the late 1990's to recognize and monitor the creative industries, with the aim to emphasize the dynamic contribution of the art sector to the economic development of the country. (Throsby, 2001, p. 112)

Yet, a single clear definition of the creative industries does not exist, and often the term is more or less interchangeably applied for cultural industries and copyright industries. One can also come across the singular form of these terms. Throsby presents a model that consists of concentric circles. According to the author the creative industries involve (1) a major creative human input, (2) some form of intellectual property rights, (3) aesthetic, educational or entertainment value. The author subsequently states that the core creative industries include the arts, while the circle around it concerns sectors that produce reproducible cultural commodities. Examples are the film, music, and book industry. In essence, the further away from the centre, the less the focus lies on autonomous creativity and the more the economic aspect is emphasized (Throsby, 2001, p. 112). Hesmondhalgh (2007, p. 12) on the other hand excludes the arts, as the creative industries are above all an industry at which the aim is, more or less, to make money. He emphasizes that the creative industries involves the industrial production of goods with social meaning. Core creative industry includes broadcasting, film, music, and publishing. Surprisingly the author also includes computer games, and marketing. Although most scholars would agree on the first list of examples, the latter two might provoke a more ambiguous response

Although an attempt is made to distinguish the creative industries, there are some problems with the definitions. Firstly, it is hardly possible to measure to what extent a cultural good has social meaning or generates additional values. Secondly, intellectual property is not an essential characteristic of the above-mentioned sectors. For instance patents can be requested for a wide variety of items outside of the creative industries. Thus, it is very difficult to draw a strict line between goods produced by so-called creative industries, and those produced in other sectors. Yet, it can be concluded that the creative industries are concerned with goods that have a

creative as well as an economic component, but the definitions that put an emphasis on the reproducible good characteristics of the creative industries, exclude the arts.

In practice this dichotomy can also be found. For instance in the Netherlands it seems that a distinction is made between the arts and sectors in which creativity is a dominant tone. In its national cultural policy (Ministry of Culture, 2008b), the ministry of Culture does not refer to the cultural industries a single time, but instead refers to the cultural sector, which includes the performing arts, visual arts, design, architecture, literature, film, and cultural heritage. This includes many of the creative industries, but only the ones closely related to the creation of creative products. For instance advertisement is left out, as well as graphical design. The Ministry of Economic Affairs, who, in regard to international cultural policy and the creative industries, closely collaborates with the Ministry of Culture, categorizes the creative industries as follows:

- Creative service sector, which includes fashion design, graphical design, architecture, and industrial design.
- Media and entertainment, which among others consist of radio and TV broadcasting, film industry, journalists, publishers, but also bookstores and printing offices.
- Arts, which include the heritage sector, performing arts, but also the CD and DVD industry.

The UK on the other hand includes not only design, designer fashion, music and architecture, but also advertising, art and antiques, crafts, film and video, performing arts, publishing, television and radio, and software.

The above-mentioned definition shows that the Ministry of Economic Affairs includes the entire chain of production of products, instead of only the creative production itself. For instance, not only the author is included into the creative industries, also its publisher, the company who prints it, and even bookstores. Another oddity in this classification is the classification of the CD and DVD industry, which is anything but related to the arts. Apart from that it could be argued it neither can be associated to the creative industries as the production of CD's and DVD's is not preceded by a creative process. The same applies to bookstores and printing offices. If these are to be included into the

creative industries, then the production of commodities like cars and toothbrushes should also be included. Seeing that all products have been designed, and the production chains are very long, one could virtually include the entire economy into the creative industries.

A consequence of this all-inclusive definition of the creative industries is that these no longer have any distinguishing features. Nor does the claim hold that spillovers to other sectors are being generated, as the definition already includes almost every sector within the economy. Instead it would make more sense to speak of the creative economy, as Howkins suggests (2002), as an indication of the changes the economy went through in the past years. It should be noted however that Howkins (2002, p. 116) applies a very broad definition of the creative industries as well, i.e., advertising, architecture, art, crafts, design, fashion, film, music, performance arts, publishing, R&D, software, toys and games, TV and radio, and video games.

Although it is often claimed that the economic impact of the creative industries is rather large, measurements of economic impact are questionable. In the UK it was estimated that the creative industries (minus crafts and design) accounted for about seven percent of GDP, and employed one million people. Compared to other sectors the contribution to the economy is substantial. Other reports on the economic impact of the creative industries estimate that these sectors have a much lower impact, not only on the economy of countries in general, but also on that of the UK. According to Towse (2009, p. 4) these diverging conclusions are the result of the use of a wide variety of definitions of the creative or cultural industries. Obviously, the wider the definition, the larger the presumed economic impact.

The concentric model proposed by Throsby is rather sophisticated, yet I am most comfortable with a classification that combines the definitions suggested by Throsby and Hesmondhalgh. Although I agree with Throsby that the creative industries involve creative human input, a form of intellectual property rights, and aesthetic, educational or entertainment value, I would prefer to include Hesmondhalgh's criteria as well (reproducible goods which create economic value). An implication of this is that a distinction has to be made between the arts and other creative sectors that are to a larger extent profit seeking. As the differences between the arts and sectors that involve

creativity are extremely large it would not be desirable to generalize. For instance, the arts are by and large depended to subsidies, while other creative sectors are market driven. As a result the financial structures, as well as incentives and behavior of firms, are very different. Some classifications of the creative industries include the entire production chain of products. In that case almost the entire economy could be included. Hesmondhalgh also includes sectors that do not include some form of intellectual property rights. An example is publishing. In contrast, Throsby states that the presence of intellectual property rights shapes production, and makes it possible to make a distinction between sectors that involve a lot of artistic creativity, and those that do not. In conclusion, in a graphical representation of the cultural sector and the creative industries, the above-mentioned classification would suggest that the heart of the cultural sector consists of the arts. In short, in the arts everything else is subordinated to the creative process. The ring around it would include the cultural or creative industries, at which creativity is still the mainstay, but addressing the market is equally important. The outer circle would consist of firms that are part of the production chain of creative goods, but not directly create goods that are protected by intellectual property rights, or involve a large amount of creativity. Examples are firms that produce information carriers, and printing offices. Although a strict line between these circles could not be drawn, the diagram would provide insight into the differences between the arts, creative industries, and facilitating firms behave.

3.2.1 The Creative Industries Deployed as a Branding-tool: Cool Britannia

The development of the creative or cultural industries as a field of studies went hand in hand with the decision of the government in the UK to proclaim the economic value of these sectors, and their role to reform the image of the country. Although this example was followed in many countries, the strategy of the UK turned out to be not an unqualified success. That not all branding strategies are successful is illustrated by the attempt of the British government to present the country as cutting edge. In the 1990s 'Cool Britannia' was employed as the central theme to rebrand the country. The slogan Cool

Britannia is a pun towards the patriotic song Rule Britannia.

By the mid-1990s not only the economy in Britain (and especially that of London) was booming. Also the cultural sector flourished. For instance, the banking sector of 'the city' could finally measure up to that of New York, but also in music, art, fashion, and architecture London held a prominent position. Some art dealers like Charles Saatchi became worldwide renowned. In the field of architecture there is the example of Richard Rogers, who was known mainly for having designed the Centre Pompidou in Paris. His career really took off around that time. In regard to the fashion world, French fashion houses Givenchy and Dior hired English fashion designers John Galliano and Alexander McQueen as their top designers. The 1990s is of course also known for the rise of so-called Britpop, represented by Blur, Oasis, The Stone Roses, and Spice Girls. The economic and cultural revival that took place in the United Kingdom resulted into a boost of national pride. It should be noted that the above-mentioned development took place without government interference. In 1997, after 18 years of Tory's reign, Tony Blair's period of 'New Labour' heralded a new era. Around that time, after London was declared to be "the coolest place on the planet" by an American newspaper, Conservative Party openly embraced the creative industries. Yet, the 'Cool Britannia' campaign was launched by Prime Minister Tony Blair's government, with the aim to strengthen the image of 'New Labour' (McGuire, 2009). Ironically, soon after the launch of the campaign, people already got tired of the slogan. The campaign consisted among other things of the invitation of prominent artists to shake hands with the Prime Minister. Photographs that were taken during this event were presented with the aim to make a connection between 'New Labour' movement and the 'cool' creative industries.

According to The Economist (1998) there are several reasons why the campaign failed. Firstly, British people did not support the campaign, as they could not identify themselves with it, because the desired image stood too far away from the current impression of the country. As a result it was believed to be a hollow phrase. Secondly, the creative industries were embraced as the icons to carry out the image that Britain is cool. Apparently it was not accepted by the fashion designers, pop musicians, and movie stars that they were positioned as representatives of the country. It could be that this was the case

because of the same reason that the common people did not accept the campaign, simply because the brand strategy stood too far from the existing image. The author of the article however believes in general it was a risky business to lean on the creative industries, as these are characterized by its spontaneity and capricious nature. Although this opinion is not really grounded by arguments, there is something to say for this. From a modernistic viewpoint it is often believed that art should be independent from politics and social developments (Van Gogh Museum, 2010). However, it might be that artists adhere to this principle more than people active in the creative industries. Therefore it could be questioned whether artists, and to some extent people active in the creative industries, have a positive attitude towards the idea of being utilized as a tool of the government. At the moment this is exactly what is happening in the Netherlands, where the creative industries are taking in a central position in the international cultural policy. An example is the fashion designer couple Victor & Rolf, who are embraced as major ambassadors of the country.

Yet, the situation in the UK was quite particular. I believe that the reason the campaign failed, was above all that New Labour did not have anything to do with the development of the creative industries, as these were already at its high before the Labor Party won the elections. In that way it indeed was a hollow phrase to make a connection between this party and the creative industries. Most likely it is because of this, that artists did not accepted to be exploited as icons for the government's Cool Britannia campaign. Although the current situation in the Netherlands is different from the situation in the United Kingdom in the 1990s, the Cool Britannia campaign shows that there are risks involved in adopting the creative industries as icons for a country.

4 Conceptual Framework

Nation Branding has been defined as follows: "the unique, multi-dimensional blend of elements that provide the nation with culturally grounded differentiation and relevance for all of its target audiences" (Dinnie, 2007, p. 149). On the one hand this emphasizes that a country's 'brand' is a complex matter that consists of many facets. Dinnie argues that this is in contrast to product brands. On the other hand it is argued that nation branding is mainly about how a country is perceived by others.

The concept of nation branding as it is known and practiced now stems from the field of marketing, and as an academic field of study it is fairly new. Yet the branding of places is widespread. An example can be taken from the Netherlands, at which most cities developed a marketing plan in order to distinguish themselves from other cities. Nation branding is closely related to that of city marketing/ city branding. The difference between these concepts is the unit of analysis. The former focuses on the way a country is perceived, while the latter obviously emphasizes the regional identity. Both city marketing and nation branding are examples of place branding. Skinner and Kubacki (2007), who inventoried the current situation on nation branding and developed a model on how a nation's brand identity comes about, conclude that place branding is a complex matter, as there are many factors involved. Until now marketing tools have been employed to approach the branding of places. Also, recommendations in regard to nation branding policy are, by and large, made by consultants who do not base their advice on thorough research. Kubacki questions therefore how suitable these marketing tools and methods are for branding a country, as this process is rather different from branding a product.

Within nation branding there are in essence two approaches to the matter, each with their own background. The most predominant author within

the field of nation branding is Simon Anholt, who has a marketing consultancy background, and approaches the matter by means of marketing theory, which I like to call the marketing approach. Basic point of departure is the assumption that nation branding is a new development, and that countries are similar to any other product that can and should be branded. Another line of reasoning comes from the field of public diplomacy. Van Ham, who originates from the field of public diplomacy field. This approach elaborates on the existing literature on nation branding that took marketing theory as a point of departure. The main difference between the approaches is the influence that is attributed stakeholders might have on a country's image. Although I have made an attempt to contrast the two viewpoints, it should be noted however that a clear line between both is not easy to draw. This is mainly because all publications are based on Anholt's work, and authors are not always that easily categorized.

4.1 Nation Branding

The American Marketing Association (2007) defines a brand as "a name, term, sign, or design, or a combination of them which is intended to identify the goods or services of one seller or a group of sellers and to differentiate them from those of competitors". Other definitions also include internal and organizational processes, as these are regarded to be part of the communication process of the organization's identity (Heding, Knudtzen, & Bjerre, 2008, p. 9). In essence a brand is the identity of a good, created by the sum of all means of communication. Kapferer (2004, pp. 401-403) believes that a brand is not only about the communication about the product, but also about the product itself. He argues that a brand is the sum of a name, a product, and a concept. The latter is expressed by the way the good is positioned on the market. Therefore branding strategy and business strategy should go hand in hand. It seems that marketing is more focused on communication, and branding involves the characteristics of company and the product as well. However, a clear distinction between these concepts is not easy to make as these are often used synonymously. Although brand identity and brand image

might sound like quite similar concepts, in the field of marketing a subtle difference is made between these terms. Brand identity is regarded to reflect the characteristics of the good that the firm aims to establish or maintain; while a brand image consists of the associations the consumer has of the brand. In essence the difference is that former is what is aimed for, while the latter represents the current view of the costumer (Heding et al., 2008, pp. 15-20).

Interestingly, most countries seem to overestimate their image. In a survey conducted in 2005, it turned out all countries rate themselves higher than their actual overall score on the Nation Brand Index (Anholt, 2007, pp. 56-57). Moreover, most countries in the top 20, thought themselves to be on the top position. For instance the Netherlands, who takes 12th position, believed to be on top of the list. Although it is important that a country is realistic about its strengths and weaknesses, it might also be that a too modest approach will not benefit a country's image either. In a way it is not a bad thing for a country to claim that they are very good or even the best in a certain area, even when they are not. As there are many competitors, and the differences between countries are rather small, it might be questioned whether it is very relevant to know which country really is the best in a specific field.

4.1.1 Nation Branding: A Contemporary Concept?

Although nation branding is a contemporary concept, it is believed by some that countries have always undertaken activities to shape their image (Olins, 2004, p. 19). Examples are the creation of symbols like coins, a flag and a national anthem. In this respect it could be argued that the terminology of nation branding is new, but the practice is not. Van Ham (2001, p. 6) also points out that place branding is not a new thing; Countries have attempted to change their image for ages. The main difference between the past and present is the amount of information that is available. Until recently a lack of information shaped the image people have of countries, and a forerunner of place branding, that is propoganda, was especially applied to conflict situations. Yet the difference between propoganda and place branding is that the latter is less intrusive. Many people have mixed feelings about nation branding and branding in general. The conceptual link between propoganda

and nation branding has a negative effect. As the former is associated with lying and providing disinformation, it might be that nation branding is not regarded very credible among the general public (Ham, 2001, pp. 6-8). Yet, branding in general has a bit of a negative connotation as well, as it concerned with the message and not with the content. Also, what marketers in essence do, is attempting to influence desires of potential consumers for personal enrichment. The similarity between place branding and today's public diplomacy is that both concepts focus on values, and aim to establish a dialogue with foreign audiences. This is in contrast to traditional diplomacy that by and large deals with issues or problems. According to the author the difference between the two concepts is that public diplomacy is less concerned with (deliberately) creating an identity (Ham, 2001, pp. 10-11), but instead on establishing relations.

The main difference between Anholt's marketing approach to nation branding and Van Ham's public diplomacy's stand, is the way nation branding takes place. Anholt presents nation branding as a new development. From a marketing perspective it could be argued that it is a new concept. At first branding only took place in regard to products, and now the principles of marketing are applied to countries as well. From a public diplomacy stand has always been taken place. I believe the main difference on this point is that from a marketing position, the branding of a country deliberately takes place, while from a public diplomacy viewpoint the branding aspect follows other activities.

4.1.2 State versus Nation

Skinner and Kubacki (2007, p. 306) argue that a nation's brand identity is closely related to its national and cultural identity. The reason for this is that 'nation' can both refer the country, as well as a people with shared culture. However, at present the generally acknowledged view appears to be that a nation consists of both aspects. The authors therefore argue that "various facets of nations and cultures including economic, legal, cultural and political systems' (...) should be included in an analysis (Skinner & Kubacki, 2007, p. 307). In essence the difference between national identity and nation brand, is that the people within a country perceive the former while the latter is the

image that exists outside the country. This is similar to product brands, which have a certain identity or characteristics, as well as a brand image that is perceived by the (potential) consumer. The act of nation branding is the process of establishing a nation brand. (Skinner & Kubacki, 2007, p. 310). Within the marketing approach it is more or less assumed that a country consists of a people with shared cultures and history.

The public diplomacy viewpoint on nation branding acknowledges the above-mentioned idea that a country's identity is made up by many elements. Yet, it also emphasizes that a nation is not necessarily equal to a country. Van ham (2000, p. 58) sets out the difference between state and nation. Whereas a state refers to an area governed by autonomous authorities based on law and constitution, a nation is based on a shared cultural identity. Although state and nation might be identical for a particular region, this is not necessarily the case. For instance Europe is good on its way to becoming a state, but it is far from a nation, as people do not regard themselves as Europeans. Conversely, many countries accommodate several distinctive communities. An example can be taken from Spain, in which the regional identity in some regions is stronger than the national identity. The Basques, for one, regard themselves above all Basques, instead of Spanish. Less extreme examples can be found in the Netherlands as well, for instance in the Northern province of Friesland.

A strong point from the marketing approach is the eye for the variety of aspects that make up a people's identity. Yet, the difference between nation and state seems to be neglected in marketing based nation branding theory, in which it is assumed that a country, i.e., state, is automatically a nation. The result might be that the complexity of a country's identity is being downplayed. The public diplomacy school of thought correctly argues that the identity of a country often consists of more than one nation. The existence of these strong regional identities makes it nearly impossible to brand the country as one nation. These distinctive regions often propagate their own unique features to attract tourists, direct foreign investment, and business partners, and in this respect the regions compete with each other instead of disseminating one coherent brand image of the country.

4.1.3 Objectives of Nation Branding

The three main objectives of nation branding are: attracting foreign investment, and as well as increasing tourism and export. Apart from that, nation branding might positively affect international political influence, strengthen international partnerships, and attract talent. On an internal level nation building might enhance nation building by boosting civic pride (Temporal, 2008). The relevance of nation branding is based on the following developments: firstly, due to globalization the competition between countries has increased. In essence globalization is about the process of diminishing distances, which makes it easier to exchange knowledge or do business with various partners. The effect of this is that places and goods, but also ideas, that used to be out of reach, have become widely accessible (Sanchez-Tabernero, 2005, p. 463). In practice this implies that there are much more suppliers with comparable supply. In regard to countries, this means that there are many countries that offer similar 'products'. Secondly, it is argued that the differences between countries, and the products they offer, are becoming less obvious. For instance infrastructure, legislation, and the level of education have become rather uniform. This has the effect that products are to an increasing extent of comparable quality, functionality, but also price. This shift is very noticeable in the European Union. In essence it means that the image of countries is becoming more important than real distinctive characteristics (Duijvestijn, 2004, pp. 4-6).

Regardless of the above-mentioned arguments on its importance of nation branding, nation branding is hardly a final goal of activities. For instance, many activities are employed to increase export and direct foreign investment. It is true that a strong nation brand will most likely result into a competitive position, but the activities that are employed to reach a competitive position on a certain point, do not have the aim to directly alter the image of a country. Most likely this is also because strength of a brand is very difficult and costly to measure, this is in contrast to solid figures on tourism, direct foreign investment, or export.

4.1.4 Communicators of National Identity

Although nation branding involves many communicators, and the concept is by and large based on economic motives, the arts and heritage are assigned a large role. On the one hand this is because this is the main aspect in which a country can be distinguished from another, as other solid characteristics are becoming more and more similar (Duijvestijn, 2004, pp. 4-6). An example is the development of computer programs and hardware, at which many countries, also in countries in development, are able to be competitive. Yet it seems that there is no consensus among scholars on the determinants of national identity (Skinner & Kubacki, 2007, p. 209). Examples of these determinants are language, political identity, inherited traditions, religion, cultural symbols, and "high" and "low" cultural expression (2007, p. 309). The authors also explored what the communicators are of a nation's brand. According to Kotler and Gertner (2002) the most important communicators are the entertainment industry, media, art, music, famous citizens, proclamations, geography, and history.

Sports could be added to the list of communicators, as these focuses the attention towards the country involved. Both history and geography do not belong to the above-mentioned list of communicators. Although history and geography determine for a great deal a nation's identity, these are in itself no means of communication in itself. Instead these are often subject of the communication, especially in art. For instance artists always played a large role in showing how an unknown country looked like, and how people lived. An example is the custom of countries to bring representative art and artists on official diplomatic journeys. It could be argued that not only works of art but also the artists itself can be regarded as communicators of a nation's identity.

Anholt (2002) argues on the other hand that not only a nation's culture is of influence, but also its language, popular culture, the creative arts, tourism and travel writing, as well as commercially branded products. In a more recent publication (2007, p. 25) the author argues that a country's image is communicated, either or not deliberately, by means of six channels: (1) tourism promotion; (2) exported brands; (3) policy decisions of authorities, not only on foreign affairs but also internal affairs that get attention by the international media; (4) people from the country itself, in the position of ambassadors. This

includes political leaders, media and sports stars, but also the population in general; (5) cultural expressions (among other things by means of cultural exchange, cultural activities and exports, but also through individual artists and sportsmen; finally, (6) the way foreign investment is stimulated and foreign talent and students are attracted.

I would say that the first four make sense, but the last two categories have an overlap with the role of policy decisions and individual ambassadors. It should be noted however that Anholt does not explicitly clarify the concept of culture, but it seems that he defines it in an anthropological way. Dinnie's framework (2007, p. 49) on national identity, its communicators, and national brand image, intends to provide an insight into the differences between these three concepts. The nation-brand identity consists according to the author among others of history, political regime, architecture, sports, literature, art, religion, education system, scenery, music, gastronomy, folklore, and other icons. Its communicators subsequently are exported brands, sport events and achievements, cultural artifacts, foreign policy of authorities, and predominant personalities. These communicators thereupon affect the image at a wide variety of audiences.

Both Anholt and Dinnie provide a useful definition of the communicators of a country's image, which are perhaps not exhaustive, but still provide a useful insight into the matter. Anholt's framework inexplicitly assumes that the characteristics of a country's identity are equal to its communicators. This contrasts Dinnie's outline, who makes a clear distinction between these concepts. Although the framework aims to set apart a country's identity and communicators of its identity, it should be concluded that a distinction cannot be made so easily between these concepts, as many characteristics of a national identity are communicators at the same time. Also, a scientific definition on these communicators and characteristics of a country's identity cannot be developed as it is simply a matter of preference what could or should be included. The only conclusion that can be drawn on basis of the literature, is that a wide variety of communicators of a country's image are in existence. Also, it is not exactly clear what these communicators exactly are, nor how strong the effects are. Yet it shows that nation branding a multifaceted concept that involves many aspects. Another point of interest is

the fact that a country's image is often reduced to stereotypes, which are in essence simplifications of the reality. In addition, as Skinner and Kubacki (2007, p. 312) point out, these may even be based on outdated or incorrect information. The question that subsequently comes up, is to what extent these communicators mirror the 'real identity. In regard to consumer products it is always the case that a marketing message constructs an image in which some aspects are left out, while other characteristics are emphasized. According to marketing theory the message is deliberately adapted to the target audience in order to shape or transform the perceived image. For instance a commercial doesn't mirror the product entirely. The same holds for every communicator, also in regard to communicators of a country's image. This even holds for communicators at which the constructed image is a by-product so to say. Another striking matter, is that neither of the above-mentioned authors have paid much attention to the extent these communicators intentionally or unintentionally communicate a country's image, and to what extent these means of communication can be deployed as a tool to deliberately brand a country.

4.1.5 Principles of Nation Branding

Although the term nation branding suggests that it is mainly concerned with communication (or fluff as Lanham (2007) defines it), Anholt (2008, pp. 1-3) stresses that it involves more than just an advertising campaign, slogan, and graphical design. While marketing also plays a role, the author is convinced that the deeds of the country have more effect on the image than just words. The author states that, as there is no evidence that marketing communications can change the attitude towards an entire city, region or country, conducting such a strategy is a waste of taxpayer's money. Furthermore, the effect of nation-branding campaigns is unknown, as hardly any country that conducted a serious branding strategy made an attempt to measure its impact. The author points out that, in contrast to what the name of the concept would suggest, nation branding is not about communications but instead it concerns (a change of) policy. Although the marketing approach to nation branding acknowledges the complexity of a nation brand image, it assumes that a country's brand can be managed, and that it is the authority's responsibility to do so.

According to Anholt (2008, p. 3) in essence there are two main challenges that countries face in regard to nation branding. Firstly, they need to define a more or less consistent direction. Secondly, the objective should not only be feasible but also inspiring. The author believes that in practice it often turns out that the one often excludes the other, with the result being that goals are inspiring but not feasible or the other way around. The author (2008, pp. 4-6) also identifies five key principles to nation branding: (a), in order to influence public opinion a countries need to connect to the outside world, and communicate in a clear way; (b) A nation's brand image is constructed by the perceiver and influenced by many factors of which the government can have little influence; (c) A reputation, i.e., brand equity, is very valuable, but it needs to be managed and measured over the long run; (d) Engagement of (groups of) people from within the country to which a central strategic vision is essential; (e) New and innovative aspects draw more attention than events that happened in the past. In addition to these principles, the author argues that there should be a triad between strategy, 'substance', and symbols. In the first place this means that a consistent approach to branding the country is needed. Secondly, the strategy should be focused to really make a change within the country. Examples are social or economic improvements. And thirdly, symbolic actions, which should have a strong communicative power over the aspects that are to be communicated, should take place. An example of a symbolic action is Spain legalizing gay marriage, with the aim to demonstrate the modernized values of the country.

On the one hand Anholt recognizes the minor influence governments can have in deliberately shaping a country's image. At the same time he nonetheless implies a pretty large interference by the government into the economy, and suggests that the market forces are insufficiently capable of creating a competitive advantage on a certain aspect. Yet it makes sense that policies should not contradict to the message the country aims to spread. It also seems that Anholt adjusted his viewpoint over the course of time. Whereas he emphasized at first that nation branding involved streamlining communications about the country (Anholt, 2004), in articles of a later date, the author believes that the role of the government should be a steering function by means of policy (Anholt, 2008, p. 3). Yet, by emphasizing the

importance of policy, the author stresses that communication alone does not work. However, it is also stressed that only having a good policy does not work either, as it should be a combination of communication about what you do and actually doing something (Anholt, 2008, p. 3). Although the author did not go through a radical change of opinion, the role attributed to the government has transformed from a coordinating to a facilitating function. Another thing that struck me is the remarkable thing that Anholt attempts to convince the reader that nation branding is something totally different than branding products. Yet all of the above-mentioned principles to nation branding more or less holds for any other type of goods and services as well. This makes one think that there are more similarities between these concepts than differences.

In contrast to the marketing viewpoint, the public diplomacy stand does not believe that a nation's brand image can be that easily swayed by governmental policy. Although branding a country is to some extent similar to branding products, a nation brand is more complex and less controllable than 'ordinary' brands. In contrast to other types of brand, the means of communication about the country are much more diverse. Also, the image is for the larger part an unintended consequence of actions of individuals (Ham, 2001, pp. 10-11). Dinnie (2007, p. 146) believes that the main reason of nation branding being more complex, is the fact that there are much more stakeholders involved in nation branding than branding other goods. Dinnie argues that, the more diverse a country is, the more challenging it is to carry out a consistent message. For instance, migration increases heterogeneity, which makes it harder to indicate what is typical for a country.

4.1.6 Effects of a Nation Branding Strategy

From a public diplomacy stand it is argued that, although a nation's brand identity is not a fixed construct, there are many constraints that limit the way a country can position itself. Point of departure is a constructivist approach towards identity, which means that it is assumed that the identity is constructed by means of social actors, and continually revised by them. Examples of these social factors are history and politics. This implies that identities are contextual but also flexible. Nevertheless countries are constrained in the way they can choose their role or identity. Examples of these

constrains are political settings, institutions, and expectations. (Ham, 2000, pp. 20-21).

The marketing approach to nation branding stresses that companies, or in the case of nation branding this concerns countries, do not construct their own image, as it is the consumer or citizen who conceives and interprets the message (Anholt, 2004, pp2-7). Nevertheless a brand image can be developed. Especially in the case of a nation's brand image this goes neither easy nor quick (Anholt, 2004, p. 116). The author applies the metaphor of a supertanker, which takes about five miles to change course and even more miles to stop. The effect of any individual branding-activity is very little, as it is just a drop in the ocean. Yet the author argues that many drops can make a difference.

The marketing approach and the public diplomacy viewpoint have in common that they acknowledge that a country does not have much influence on the way its image is perceived. Yet there is a subtle difference. The former emphasizes that it is the observer who constructs the image, while the latter, in addition, argues that the way a country can present itself is limited by external factors. These claims complement each other and underline that a country cannot choose its own brand image. Interestingly, Anholt has a strong belief in the influence of policy in regard to nation branding, but at the same time he acknowledges that the influence of policy is little. In regard to the statement that it is the consumer who constructs the image of a brand, I believe it depends on the complexity of the product to what extent this statement holds. Although the claim makes sense, I would say it would not be entirely correct to state that companies do not have influence at all on the way their product is perceived. It could be argued that it might be the case that it depends on the type of product how much 'freedom' for interpretation the consumer has. When it concerns a basic product the consumer is rather constrained to interpret the good. For instance, there are not many ways to construct an image of a brand for household products. However, with complex goods, at which there are more actors and information channels involved, the consumer can base her or his opinion about the good on many diverse channels of information. As countries involve many stakeholders, it is fair to state that these are complex goods. From this it might be concluded that the influence

one can have on how a country is perceived is rather small.

An important thing to realize is that national identities are not only constructed and perceived from within, but also from outside of the country (Mayer & Palmowski, 2004, cited in Skinner & Kubacki, 2007, p. 308). The authors add to this that although a nation's identity is not a fixed construct, changes appear rather slowly. Also the way it is perceived outside the country changes equally slow, perhaps even slower. This is in line with Anholt, who also believes that an image of a country can be deliberately altered. The influential book by Kapferer (2004, p. 26) on branding theory confirms that establishing a strong image is a long and difficult process. Indicators of brand strength are the ability to ask premium prices, and market share. According to the author advertising does not directly generate an increase in market share, nor the ability to charge a premium price; it is the reputation that eventually leads to a strong brand. In turn, the more well-known a brand is, the more an advertisement is noticed. Thus, a strong reputation increased the effect of marketing campaigns.

In essence Kapferer touches upon a 'chicken-or-the-egg- problem'. A strong brand reputation is needed for a maximum effect of advertising campaigns, while at the same time advertising is also needed to get your brand noticed (Kapferer, 2004, pp. 26-27). The assumption in this thesis is therefore is that the influence of government policy or the activities of individuals or companies can have on the image of a country is very small, as these images are relatively stable over time.

One thing neither Anholt nor the other authors on nation branding point out, is the difference between marketing a country and actively attempting to transform an image. It is obvious that it is much easier to confirm an established image, than trying to change attitudes. In addition to this, it is also important to realize that an image of a country is in essence the result of normal economic transactions. In that way these are unintended side effects of individual activities on the market. If it is assumed that a country's image is merely generated through transactions in the economy, the implication of this is that the contribution to the nation's image is an unintended by-product. The reason for this is that individuals and companies are mainly focused on their own actions, and not so much on the effect on the image of the country as a

whole. Thus, when artists are taken as an example, this means that they are above all involved into establishing themselves. Nevertheless these artists can contribute the image of a country. For instance Dutch Design is regarded as a strong trademark, especially abroad. A classification of Dutch Design does not exist, but it is often said that Dutch designers have a clear and straightforward way of designing in common, which distinguishes them from designers from other countries. Abroad Dutch Design is a strong brand. Although this image is the work of a limited group of designers, many Dutch artists benefit from the image of Dutch Design, as it provides an opportunity to join in on this image, and present it as something they adhere to. At the same time it is believed that Dutch Design also generates spillovers to other sectors, as it makes the country known as no-nonsense and innovative. Although Anholt assigns a large role to the government, it can be questioned to what extent government policy is really capable of 'streamlining communications' within a sector, as the author defines the government's task. In economic terms: it can be questioned whether government policy can generate a crowding-in effect in regard to branding a country.

4.1.7 The Connection between Nation Branding and Nation Building

The term nation branding suggests that the concept is very much concerned with the communication about the country, which seems to be in contrast with nation building. Economics of Attention builds on the basic economic premise that resources are scarce. Lanham (2007) argues that globalization resulted into an information overload. As a consequence of this there has been a shift from scarcity of information towards an information overload and, as a result of this, a scarcity of attention. Because the options for individuals to choose from and the information available have increased significantly, consumers don't have the time to carefully select their best option. The result of this is, according to Lanham, that choices are made based on superficial information, and that there is a severe battle between companies to attract the attention of consumers. As we read in the previous chapter, this line of reasoning corresponds to the ideas of Kapferer, who mentions that the existing

reputation of a brand determines the affectivity of a marketing campaign.

Lanham states that it seems that it is merely about 'fluff' or style, and not so much anymore about the 'stuff', or content. In other words, there has been a shift away from functional towards fashionable. By this the author means that the actual product (i.e., the stuff) has become less significant, while everything around it, that is the fluff, has become more important. Examples of fluff are the packaging and brand; not the most durable or functional car is chosen, but one that appeals to the desired image of the consumer. This also has implications for the way goods are designed. Whereas many goods used to be produced to last a lifetime, nowadays even durable goods are treated as consumption goods, and replaced within short notice.

Lanham's statement that there is more attention to fluff is nowadays is confirmed by Van Ham (2001, p. 3) who states that it seems that firms rather invest in improving their brand identity instead of the quality of their product. Van Ham even goes one step further by saying that lacking a brand identity means certain death for companies that aspire to establish themselves globally. The author believes the same applies to states; countries that lack brand equity will not survive. The author (2001, pp. 4-6) also argues that the 'product' countries have on offer is often rather similar. He therefore sees a task for politicians to find a brand niche in order to distinguish the country from the competition.

There are several correlated concepts, of which it is not always clear at an instance what the differences are. Apart from nation branding, the notions of state building and nation building are discussed as well. With state-building mainly used to describe the process of installing the institutions of a national government, for instance after a period of conflicts. This is literally establishing a state. Nation building often refers to the procedure of establishing a national identity by means of symbols. An example is South Africa, at which not only a new government had to be created after the abolishment of apartheid, but also a feeling of citizenship had to be established (Whaites, 2008, p. 4). In essence nation building is about the process of creating a feeling among people they belong to the same country. Although this mainly refers to intangible aspects, it involves the creation of physical symbols as well. Examples are dictionaries, a central weighing system, coins, flags, and national anthems (Olins, 2004, p.

19).

I would say a parallel could be drawn between the claim that the attention to fluff has increased, and the trend that there is an increasing interest to branding products, people, and even countries. When the idea behind stuff and fluff is connected to countries, it could be argued that the stuff consists of a country's actual assets, while the fluff includes everything that is focused on the image. As nation building has a focus on establishing or changing the image, it could be argued that nation branding is deals with fluff. This is in contrast to nation building, which might be regarded equal to stuff since it concerns the actual material assets of a country.

Not only a distinction can be made between fluff and stuff in regard to intended consequences, a similar categorization can be made as well between in reference to unintended consequences. Theory on Nation Branding suggests that nation branding partly intentionally takes place, and it's the government's role to conduct a nation branding policy. As I discussed in section 4.1.4 about the communicators of national identity, many other means of communication of a nation's brand image exist apart from the 'official' channels. For the larger part a country's image comes about by means of ordinary economic transactions. In other words, companies and individuals unintentionally shape the country's image for a great deal. These stakeholder's activities, which have unintended consequences on the image, i.e. externalities, can also be subdivided into fluff and stuff. The first category consists of branding activities that have an unintended effect on the image of a country. An example is the reputation of Dutch Design. Although the design itself is stuff, the strong brand image of prominent designers is reflected on all Dutch designers. Not only became Dutch design a sign of quality for design from the Netherlands, it also became a trademark for the way Dutch organizations in general operate. The latter category consists of stuff that has an unintended effect on a country's image. An example is the windmills of Kinderdijk, which are not only a tourist attraction, but also reflect the innovative way of the Netherlands to keep their feet dry while living below sea level. Reflected in a matrix the relation between the above-mentioned concepts could be presented as follows:

	<i>Fluff</i>	<i>Stuff</i>
<i>Intended consequences</i>	Nation branding	Nation building
<i>Unintended consequences</i>	Externalities –related to image	Externalities – related to assets

It seems to me that nation branding focuses very much on image and not on content, i.e., fluff instead of stuff. The danger of focusing too much on fluff, is that it might become cheap talk. When the message is paid attention to and not the content, it might be the case that the message does not correspond with reality. The theory behind nation branding suggests that the image can be substantially influenced by a top-down approach. However, it is more of a bottom-up process, as the unintended effect of the actions of individuals has more effect on the way a country is perceived than activities of the government or some other coordinating body. It should be noted however that among others Anholt (2008, pp. 4-6) stresses that commitment of stakeholders is needed to create a strong nation brand, and both fluff and stuff is required. Yet the question remains open what the ratio is between the fluff and stuff of nation branding strategies, and what the result is of unintended consequences, i.e., externalities.

4.1.8 Nation Branding in Practice

Developing a strategic plan on branding a country starts with conducting an analysis of the current position of the country, (i.e., analyzing what its strengths, weaknesses, opportunities, and threats are), in regard to all distinguishing topics. Examples are tourism, talent attraction, direct foreign investment, and export promotion. For instance, with respect to tourism, key factors that might determine success are the level of consumer service, safety, value for money, and accessibility.

The analysis should not only involve these general topics, but also sectors (Dinnie, 2007, p. 221).

The next step is to develop a set of specific and measurable objectives, derived from the SWOT-analysis, and choosing strategies. The widely used Ansoff Matrix provides firms guidelines on product/ market growth strategy

that can be applied. In essence there are four market strategies, namely market penetration, product development, market development, and diversification. Which strategy is to be chosen depends on whether it concerns a new or existing product, in new or existing markets. With a market penetration strategy it is aimed to increase the market share of existing products on existing platforms, among other things by means of advertising, sales promotion, and pricing strategies. Market development is focused on addressing new (geographical) markets and distribution channels. With product development, new products for existing markets are developed. A diversification strategy, the most risky of all four, combines product development with market development. (Philip Kotler & Armstrong, 2003, p. 48). The figure below shows which strategy should be chosen in what situation.

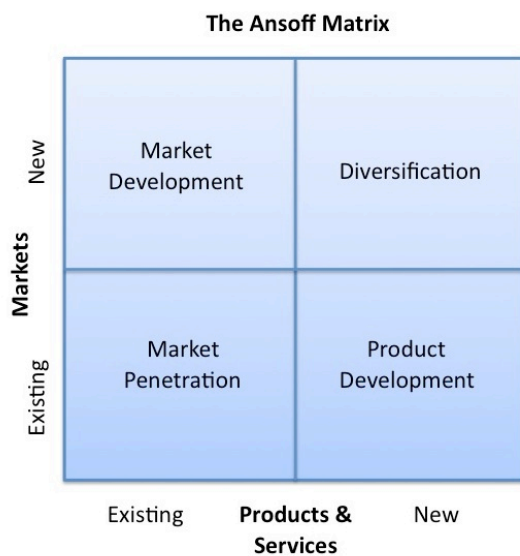


Figure 1

According to Kapferer (2004, pp. 222-224) branding strategies involve not only the above-mentioned strategies, but also a change of means of communication. The author stresses that brands are constantly in motion. He argues that brands, just like products, have a life cycle. Constant reinvention prevents a brand from reaching the phase of maturity and eventually decline. Possible tactics to prevent a brand reaching these phases are: extension of the distribution, (for instance providing the product in new regions, reduction of

price in order to face competition of potential substitutes), innovation of the product, adaptation of the product to new and changing needs, product differentiation or extension, and repositioning of the core values in order to fit the current competitive circumstances. Although this list of potential actions has an overlap with Ansoff's matrix, Kapferer's framework stresses that branding goods is not a static process, as there is a constant need to respond on developments in society, changing markets, and rising competition. Although it seems that the Ansoff's matrix simplifies branding theory, Dinnie (2007, p. 224) believes this matrix is a helpful tool for nation branding strategies, in order to identify potential directions. The final step consists of the implementation of the strategy.

What Dinnie does not mention, but is important above all, are the assets of the country itself when developing a nation branding strategy; there should be something interesting/ distinguishing to see or do in order to be able to distinguish one country from another. I agree with Van Ham that countries have become more and more similar. For instance, Western Europe and North America had until recently an advantage on the development of electronics and cars. Nowadays the Asian tigers are as well or even better capable of producing these types of goods. The same counts for tourism promotion. From the 1970's it became rather common for people to go on holiday to another country. For instance, many Dutch people enjoyed their first holiday at the Mediterranean Sea at one of the Spanish seaside towns. The promise of sunny weather, blue water and white beaches, which is quite different from the Netherlands, still attracts many tourists. Yet, because of the diminishing distances as a result of globalization, people are able to travel further. As a result of that people have more options to choose from, as there are many more countries that cater comparable holiday experiences; the combination of sun, sea, and beach cannot be found only in Southern Europe, but also in the Middle East, and the Americas. Thus, a country should find other ways of distinguishing themselves in order to face competition. In essence, not only the strengths, weaknesses, opportunities, and threats matter, also immeasurable aspects like a country's culture, i.e., in an anthropological sense; the image of how people interact with foreigners, whether or not they are prone to new ideas and new people, and so on; as well as culture in the sense of heritage, history, and arts.

In general I would say that, in regard to nation branding and the communicators of national identity, there are three relevant aspects which are hardly given attention by the literature: (1) some communicators are outside the scope of branding strategies, as these cannot or hardly be influenced by the government. Examples are individual 'ambassadors', consisting of the residents of a country, firms, artists, and other parties; (2) policy can be internally as well as externally focused. Policy with an internal focus aims to indirectly change or develop sectors (development of so-called stuff). The idea behind this is that a strong sector automatically creates a competitive advantage and thus a positive image. Externally concentrated policy in general centers towards communication and facilitation; (3) direct actions of the government can be focused to facilitate a sector. This can be internally or externally focused. Examples of internally focused activities are the organization of trade missions and collecting and providing information about countries with the aim to increase export. Examples of actions with an external focus are providing information to potential tourists by means of a national touristic organization, and providing information and services to companies abroad with the aim to increase foreign investment. Yet it depends on the point of departure one takes, i.e., the marketing approach or the public diplomacy stand, how the above-mentioned aspects are accentuated. In general, the marketing approach to nation branding and the public diplomacy viewpoint both acknowledge the complexity of nation branding and the limited influence a single party can have on the image of a country. However, in essence the difference between the two schools of thought is to what extent it is believed the image can be deliberately manipulated. Whereas the public diplomacy stand stresses that there are many external factors involved that cannot be controlled, the marketing approach to nation branding has a deep-rooted conviction that public policy can and should be applied in order to enforce a country's image.

4.2 Nation Branding Versus Product Branding

4.2.1 Product Branding

Heding et al (2008, pp. 20-26) made an inventory of the different lines of thought on branding that evolved since 1985. In essence three can be distinguished. Till the end of the 1980s it was believed that the company was the owner of the brand, which implied that it was believed that the company is in a position to enforce a brand and constitute the way it is perceived. In the 1990s there was a shift away from a company centered approach towards one at which the consumer stood central. Instead of the company, it is the consumer who eventually creates an image of the brand. From the New Millennium onwards there was a move towards a method at which it became acknowledged that a brand is part of a community. This basically means that it is not so much about the communication between the brand and consumer anymore, but instead about the position the brand has in society. In this respect it is more a macro-perspective on the matter. In economic terms it could be concluded that the community approach pays attention to the public good characteristics of the firm, and the externalities it generates, both positive and negative.

Although the above-mentioned strategies are in essence a chronological overview of the development of views on branding, Heding et al (2008, p. 15) suggest that every brand should develop its own brand strategy, based on these methods. The authors do not give value judgments on the approaches, but instead argue that all of these have their advantages and disadvantages. As every firm or situation requires an individual approach, a brand strategy should consist of elements of the branding approaches that fit the firm and situation best. However, the authors also say that the development of a new approach often is the result of shortcomings of the formerly applied approach. One could conclude that there is some truth in all these lines of thought. To a limited extent the company indeed is able to create a brand image, but still it is the consumer who interprets the brand. Also, the brand is part of a society's culture, which not only means that the firm has to respond on its environment, but that there are external factors that influence the brand. Nevertheless it depends on the characteristics of the brand how much the brand is part of

society. For instance, Philips has a long tradition in the Netherlands, and is very much part of that society, especially that of the city where it always has been located. It could be argued that there are firms that are much less connected to a specific society.

The idea that brands are part of society is very much connected to the ideas of Anholt (2004, p. 104), who states that corporate brands and a country's identity are interwoven. He states that this has internal as well as external effects. On the one hand corporate brands can shape the perceived image of a country. An example is Germany, which is known for its 'Deutsche gründlichkeit, i.e., reliability. If you want to buy a washing machine or any other household good of high quality, then buy a German brand. However, this also might work the other way around. A nation's image might also affect the way brands from a country are perceived. On the other hand, internationally renowned brands make people feel proud of their country. For instance Philips is regarded as a part of Dutch national history.

However, Anholt (2004, p. 105) believes that a country's image will not come about on its own, and interference of the government by means of a comprehensive nation branding strategy is needed to make use of its full potential. However, at the same time the author also states that the image of a country is affected by many external factors, on which the government does not have much influence. In addition, changes appear very slowly.

It is argued that countries behave quite similar to other brands. Countries and product brands are both internally and externally perceived by a large group of people. At a firm the internal group consists of its employees, while at a country this would include its residents. In regard to its external group, this consists of all stakeholders outside of the firm and everyone outside of the country respectively (Anholt, 2004, p. 105). However, there are different types of brands. Examples are a product brand and corporate brand. A nation's brand is actually more like a corporate brand than a product brand. In the process of branding a corporation, the entire firm is treated as one brand (Heding et al., 2008, p. 16). A corporate brand is often a multidimensional brand that stands for a wide range of products, which address an equally diverse audience. When a country is envisioned as a corporate brand, there might also be individual product brands. Examples are cities and regions, but

also persons, sectors, national sport teams, political and cultural figures. A product brand has a rather narrow focus, and targets for a specific group (Anholt, 2004, p. 126).

4.2.2 The Image of a Corporate Brand/ Product

The Purpose of Branding Products

Brands generate added value, as it provides the consumer a sign of quality. For the company, brands are a method to generate consumer loyalty to the brand (Anholt, 2004, pp. 2-6). Yet, Kapferer (2004, p. 20) believes that it is not useful to develop a brand for all products, as a brand only matters when there are risks involved. For instance, when there are many rather homogeneous products on the market at which the brand hardly matters, there is little risk involved for consumers. An example is printing paper. The level of transparency determines for a great deal how high these risks are. The author argues that there are in essence three types of products: (a) goods at which the quality can by and large be judged before consumption, (b) products of which the value will reveal itself after or during consumption, (c) goods at which the quality cannot even be verified after consumption. In the final category faith plays a large role. The more transparent a good is, the less influence a brand has. An example can be taken from the fashion industry, at which confection clothes can be fairly judged on their value touching and looking at the fabric. This is in contrast to high-end fashion, which appeals to a certain feeling or experience, acknowledged by other consumers and non-consumers, which does not necessarily have anything to do with quality. In essence, the more complex the good is, i.e., the less transparent, the harder it is for the consumer to evaluate a product. From this it can be concluded that countries, which are by definition complex goods, benefit from a strong brand identity.

Kapferer (2004, pp. 401-404) points out there are often good reasons to position a brand differently on diverse markets. It depends on the characteristics of the product and demands of the market how a product should be marketed. For instance, emphasizing that a car is fuel-efficient, is probably more relevant in Europe than in the United States, as on the former continent fuel is much more expensive. Also, due of cultural differences, a marketing

message will not be interpreted in an identical way. Nevertheless, one global brand identity also has its advantages.

Branding Strategies

In essence, there are three types of products according to branding theory. First there are those that are globally branded in an identical way, or with few adaptations. The second category consists of products of which the marketing strategy of the product is adapted to the local market. The final type consists of goods of which the product itself is adjusted to the local market. An additional choice that has to be made, is whether a product will be globally marketed as one brand, or under different brand names. In short it depends on the homogeneity of the market and the complexity of the good whether a product can be identically branded globally (2004, pp. 401-404).

When a link is made to the brand of a country, it should be analyzed to what extent the 'product' that is branded complies with the expectations of the market. As discussed earlier, when countries are envisioned as brands, these are more like corporate brands than product brands. This implies a wide variety of products that is offered to the market under one brand name. It is hardly necessary to mention that it does not make sense to consider the option to brand the country under different brand names. Also, product adaptation is hardly possible, as the brand image of a country is mainly the result of actions of individuals and companies within the country. The decision left, is whether the marketing strategy should be adapted to the needs and expectations of the market, or that an identical global strategy is more efficient.

Thus, in the case of branding nations, the country's brand identity could be communicated identically to all markets, or the decision could be made to emphasize those aspects that are most relevant for the target markets. There is something to say for both strategies. Nevertheless it would make sense when the branding strategy would be adapted to the market concerned, as the products are rather complex, and markets far from homogenous.

This is in line with Dinnie's viewpoint (2007, pp. 145-149), that a one-dimensional approach doesn't work, because of the diversity of the country, the high number of stakeholders, and equally diverse target groups. The author

suggests applying market segmentation in order to address all these target groups. However, the author seems to contradict himself. On the one hand the author states that diversity makes branding a country more difficult, and at the same time he embraces diversity by stating that market segmentation should take place to address diverse markets.

Stakeholders

An analysis of the stakeholders involved is very useful to expound the linkages between the organization and other parties (Merrilees, Getz, & O'Brien, 2005, p. 1063). Although there is no universal definition of stakeholders, it is often understood as those aspects that are influenced by, or have an influence on the organization, groups or individuals with whom there is a dependency-relation, or groups/ individuals who have an interest or right in the organization. The authors stress that a distinction should be made between external and internal stakeholders. Examples of internal stakeholders of a company are the employees, managerial staff, and owners. External stakeholders are suppliers, (local) community, government, shareholders, and costumers. It depends however on the company's structure who the owner is, and whether there are shareholders.

When the image of a corporate brand is applied to a country, it leads to the conclusion that it is much easier to distinguish stakeholders of an ordinary company than those of a country. Traditionally, a stakeholder analysis for firms consists of suppliers, employers, and consumers. One of the reasons that a stakeholder analysis of a country in regard to its image is much more complicated, is the fact that the role of the parties involved is quite difficult to grasp. For instance, a distinction between supplier, employer, and consumer is hard to make. In a way, the 'costumers' of a country, are not only other countries, individuals and companies from abroad, but also its own residents and companies. The latter two do not only contribute to the country's image, but they also benefit from a positive image. For individuals a positive image of the country contributes to a sense of national pride, and in the case of companies a positive image reflects on the image of the company involved. Also, a positive business climate is not only beneficial to new/ foreign

businesses, but also for national industries.

If it is acknowledged that a country's brand identity is mainly the result of unintended consequences actions of individuals and companies, these are not only consumers, but also suppliers, and maybe even employees. When it is agreed upon that nation branding actions can bring about a change of attitude towards the country, the role of the government, or the departments involved in activities that could be regarded as nation branding, is that of the marketing department, who streamlines the communication strategy about the brand. In this respect the departments involved in nation branding, are the employees.

In companies the stakeholders within society consist among others of special interest groups, NGO's, unions, employer's federations, people from the neighborhood/ city/ country. In the case of a country, there are special interest groups as well. An example is a specific industry. When it comes to NGO's, companies have to deal with exactly the same parties as governments do, as they call to account companies as well as countries. Perhaps neighboring countries and partner countries, fulfill the role of the direct community of companies, which consist of people in the direct environment. In this respect the role of the European Union, is that of the employers federation, as both have the role to control member's actions, facilitate business, and represent all members. Both parties have their loyalty towards the entire sector, or in the case of the European Union all member states, and not one individual member. Although an employer's federation can encourage actions of individual members, they do not play an active role in establishing individual businesses.

One strong point of the comparison between the stakeholders of firms and those of countries is that it expounds what stakeholders are involved when a country is envisioned as a product with a brand identity. It also gains an insight into the role of all parties involved. However, it shows the limitations of the comparison as well. It reveals that, whereas the stakeholders of a company are rather straightforward, the role of stakeholders of a country are much more complicated as one party might have several functions. Also, who the owners or stakeholders are, is even more blurred than the question who the consumers or employees are.

Another thing that is important to realize, is that a firm has one main

objective, to which all departments commit. Yet the aim of individuals and departments within a firm may not always be entirely in line with the main target. Nevertheless it is clear for everyone what the end result should be. The 'problem' that the aims of individual departments might diverge from the main goal, is much more existent with regard to countries. Not only is there a lack of a central target, also there are much more independent parties involved who all have their own objectives. In addition, nation branding often involves political goals, which might clash with convictions and ideas of other parties. An example can be taken from the tourist industry (Dinnie, 2007, p. 147). To attract tourists, many countries emphasize that unspoiled rural scenery can be found in the country. This message seems to contradict the aim to communicate that the country has modern infrastructure.

4.2.3 A Country's Image as an Externality

To an increasing extent companies have to take into account non-governmental organizations as a stakeholder. Also, there is an increased notion in the western world that companies ought to employ corporate social responsibility. Due to globalization claims or rumors of unethical behavior of companies rapidly spread on a global scale. Even when rumors or claims are untrue, these can do massive damage to the image of a brand. As a result many companies have begun to adjust their working method in order to prevent or change a negative image. There are companies that actively respond on claims that endanger their image. An example is Shell, who was attacked on its involvement in the crisis in Nigeria. There are also companies who follow trends in order to keep up with or outcompete competition Kapferer (2004, p. 77). Thus, there is an increasing need for companies to respond to external factors, which can be divided into issues that have direct negative consequences for the company involved, and factors that consist of external trends at which companies choose to react on.

On basis of a large worldwide survey among CEO's, Greysner (2003, pp. 237-239) concludes that a corporate image is believed to be mainly influenced by the following factors: competitiveness, market leadership, good consumer relations, familiarity, behavior of the firm, and communications. The overall importance that is contributed to these factors differ per sector and per

country. Yet the author believes that the behavior of the company in relation to the expectations of the consumer, affects the reputation of the firm the most. This means that the consumer does not respond equally on similar behavior of firms in diverse sectors. If it is assumed that the sector has a large social responsibility, companies are more likely to be judged on it when they do not act according to expectations.

For brands it is necessary to constantly adapt to changing circumstances and changing (needs of) markets. Kapferer (2004, pp. 216-217) is also convinced that only radical change is visible, because viewers are tended to interpret things according to their preconceptions. At the same time consistency is also important; the brand should not position itself too far from its core identity either in order to remain credible. Thus, a brand should find a balance between the urge to constantly reinvent the brand and the need to remain recognizable. The author stresses that a company should reinvent its values, instead of changing them entirely. The idea behind this is that the message the brand aims to communicate should not come out of the blue, but instead, it should be linked to the current image of the brand.

In essence, branding is not only about what you say, but also about what you actually do (Kapferer, 2004, p. 217). Van Riel (2003, p. 161) adds to this that the story told about the corporation should be truthful, relevant for and responsive to the groups of stakeholders, and sustainable on the long term, both in terms of providing utility for the organization, as meeting the needs of the stakeholders. This is in line with theory on nation branding, which also states that what is communicated about a country, should be in line with a country's actions. For instance claiming a 'green' image without undertaking any significant actions that justify that claim, will not be effective (Anholt, 2004, p. 106). How a country is perceived is based on limited information, misunderstandings, clichés, prejudice, cultural differences and cultural events that took place in the past. Even when the existing image is not correct, the author argues that it will not be effective to simply change the message that is being communicated, as prejudice is rather persistent. In addition, just like any marketing strategy, a nation branding strategy should consist of a simple and coherent message in order to have the desired effect (Anholt, 2004, p. 117). This corresponds to marketing theory, which assumes that the most successful

brands are the ones that spread the most consistent and harmonious message. The idea is that only a limited amount of information can be processed by people, and when all messages are tuned to each other there is a larger change that the brand will be absorbed (Heding et al., 2008, p. 14).

4.3 Final Remarks Conceptual Framework

One of the main differences between theory on the branding of (consumer) products and branding countries is that branding theory focuses on the unity between the development of the product and the image of the brand. Branding products not only concerns the way communication takes place, also the strategy on the product itself is involved. Whereas branding theory stresses the need for product innovation and differentiation, these strategies are impossible to perform when branding a country. Of course product innovation takes place, but that's done by companies, and not so much by countries itself. It should be noted however that state-run companies are an exception; these are obviously under direct control of the government.

In conclusion, external factors have a large impact on the brand image. Not only do companies have to respond to developments in society, other streams of information that the company cannot control also shape their image. As discussed earlier, this is very much the case for the image of a country, which is mainly the side effect of individuals and companies. Anholt (2004, p. 119) argues that nation branding does not necessarily involve large investments; according to the author this is more about coordinating the existing streams of information. In essence public diplomacy, which came about in the 1960s, is about influencing the public opinion abroad about a country. The author believes that it is not effective when a message is only communicated by means of official channels. Mouth of word is just as, or even more, important. The idea is that when residents endorse and actively disseminate a certain message, this could be highly effective in establishing a nation's brand. This is in line with marketing theory, at which it is believed that reviews by consumers have a large influence on brands, even more than communication through paid-for media. Despite of large marketing campaigns,

which consumers know to be (obviously) far from objective, a brand image can easily be boosted or ruined by word of mouth. Thus, a country's image is the result of communication through many different channels, which makes it impossible to establish an image that diverges from existing messages. Anholt (2004, p. 119) not only argues that nation branding is mainly about streamlining the communication about the country coming from a wide variety of information channels, he also believes that it is the government's task to do this.

When it is assumed that the image of a country is mainly the unintentional effect of ordinary transactions on the market, this is, in economic terms, an externality. In this respect it can be argued it is the role of the government to manage this image, or to streamline communications about this 'brand', as the market will not take up this task because of the public good characteristics. A public good is a good that is non-rival and non-excludable. The former implies that the consumption of one person does not inflict the welfare gained from consuming the same good simultaneously. The effect of this is that one item can be consumed by an unlimited number of persons at the same time. By non-excludability is meant that consumers cannot be excluded from enjoying the good. The implication of this is that the good can be consumed by anybody without paying. The result of these characteristics is twofold. On the one hand the willingness to pay of consumers for a public good is close to zero. On the other hand, as companies cannot make money from it, they are not willing to invest or supply the good. An example of a true public good is air. There are however very few indisputable public goods, and often it is argued that something has public good characteristics, to justify inference of the market by the government. Although many goods that are provided by governments are in essence not public goods at all, it is often stated that the high level of positive externalities that are generated by the good, provide a rationale for intervention (Begg, 2009, p. 167). It should be noted however that these externalities consist both of tangible as intangible goods. The spillover of a company's image towards the overall image of a country, is an example of an intangible externality. An example of a tangible externality is a competitive advantage in a certain field, for instance solar energy.

The strength of the image of a country as an externality is that it shows

the complexity of the concept. Not only are there many stakeholders involved, it also reveals how a country's image unintentionally comes about by means of activities of individuals and firms. In addition, it exposes how not only the image is a result of these economic transactions, but also how the image in turn can create spillovers to the market. Although a country's image comes about by and large on its own, the concept of nation branding is very much politically charged, as policy makers deliberately attempt to affect the overall image of the country abroad. Beside the question how successful that is, practice shows that to an increasing extent countries apply a somewhat coordinated vision on the way the country is presented. The picture of a country's image as an externality leaves this aspect out of consideration.

5 Nation Branding in the Netherlands and the Role of the Creative Industries

Nation branding in the Netherlands is, just like in many other countries, an explicit target. Many government departments are concerned with nation branding, not only on a national level, but also on a local and regional level. Although theory on nation branding assumes consistency in policy implementation, my case study shows that these Dutch agencies do not coordinate their activities at all, at best nation branding in the Netherlands is a kind of patchwork. This means that there are many stakeholders intentionally as well as unintentionally are involved in the process, not only government agencies but also other parties.

Theory on nation branding, which is in line with branding theory, suggests that the message should be in harmony with other means of communication. Also, the message should be consistent with the existing image as well as the actions. Although this sounds quite straightforward at first sight, it makes me wonder how a country is able to do this, as the means of communication of a country's image are almost infinite. As there are so many means of communication that a government does not have an influence on, it is not possible to streamline communications.

Although nation branding does not only take place by means of the creative industries, this is one of the sectors that gained much popularity over the past few years. To fit the research into boundaries, and regarding the fact that the creative industries have been adopted as the new 'engine' behind economic development, it was chosen to focus only on the creative industries and their role in shaping a positive image of a country.

To get a grasp of how nation branding takes place in the Netherlands and what the role is of the creative industries in this process, several topics

that are related to nation branding will be explored. It should be noted however that no attempt was made to provide a complete list of activities carried out by the government that are connected to nation branding. Also, in regard to policy analysis, I chose to put an emphasis on the activities that take place on a national level. Nevertheless it is assumed that an analysis of these topics provides a sufficient insight into the matter. The conceptual framework presented in first section of this paper suggests that nation branding is closely connected to the following policy areas:

- City Branding
- International Cultural Policy
- International trade (Direct Foreign Investment and Export)
- Tourism

In the following sections I make a connection between theory on these topics, and practice in the Netherlands.

5.1 Nation Branding & City Branding in the Netherlands

It is argued that a city's brand is very much similar to a nation's brand. Yet, the major difference between a nation's brand and that of a city is, according to Anholt, that the latter is less politically charged, and they are usually not famous for the production of a specific product. The implication of this is that a city is more considered from a touristic point of view (Anholt, 2007, p. 59). As a consequence it is argued that people think about far more practical issues when they imagine a city. Examples are the climate, pollution, friendliness of the people, amenities, and the cost of living. Even when specific cities are the political centre of the country, it appears that people do not directly relate the political aspects to the city, but instead to the country.

According to Anholt the following aspects are of relevance to a city's brand identity:

- Physical aspects of the environment, such as the climate and how pleasant it is to be in the city

- Opportunities for business and education
- How vibrant a city is, both for long as short term visitors
- Friendliness of people and safety of the city
- Basic amenities, for instance leisure time, but also the ability to find affordable accommodation.

However, it might be that it depends on the type of city whether people think about matters related to tourism or not. If we look at the Dutch situation, we could say that Rotterdam is most likely better known for its harbor and business related activities than for tourism, whereas Amsterdam is more regarded as a touristic hotspot. The Hague on the other hand is internationally mainly known for its political activities, mainly because of its hosting of international courts. As a result a patchwork of images of the Netherlands arises, as every city or region puts an emphasis on different aspects. As a result it is not possible to disseminate one simple and consistent message.

Nevertheless this is what branding theory in general, but also nation-branding theory prescribes.

The city or regional brands and the brand of the Netherlands do not necessarily support each other. As discussed in section 4.1.2 State versus Nation, according to the public diplomacy viewpoint towards nation branding, it is not a matter of course that a country is automatically a nation. On the contrary, it is rather likely that a country consists of several nations or groups with a strong sense of community. Although this sense of belonging to a group can be quite strong in regions, this can also be present in cities. Thus, these strong regional identities can also be present in cities. Naturally there is always a competition between cities. In the Netherlands many regions, among others Amsterdam and Rotterdam, claim to have the best business climate. This competition might even result into a cannibalization as in the process to distinguish one city from the other might harm the image of other cities. Dutch cities and provinces spent tens of thousands each only on travel costs to the World Expo in Shanghai, with the aim to establish a network and convince potential investors of the benefits of conducting trade with these individual regions (Edens, 2010). The author of the article questions whether this is very efficient, as these large amounts of delegations only causes confusion. In a way

it is a meaningless distinction, as international business people often don't know the difference between Amsterdam, Utrecht or Groningen anyway; Shanghai or any other major city in the world has more citizens than the Netherlands. Besides this, the distances between one city in the Netherlands and the other are so small, that people regard it as one region. This viewpoint is supported by the Netherlands Foreign Investment Agency (section 5.3.2) (Van Vulpen, 2010). It regularly happens that a trade mission is organized by a city, while another Dutch city visited the same country or region only a short while ago. In these situations Dutch cities do not benefit from it when they contrast themselves to other cities, because the host often believes these delegations come from the same region.

For certain, it might be that the concept of nation branding is not very strong at all, as there are many conflicting voices noticeable, not only from all different parties intentionally or unintentionally involved in with nation branding, but also among different authorities. In practice the main difference between branding of countries and cities, might be the subjects that are being branded. I would say that branding countries takes place on a considerably more abstract level than that of cities, simply because the image of a country is much more complex than that of a city. Whereas Dutch cities by and large have specific assets they want to draw attention to, the assets of the Netherlands, just like any other country, are much more diverse. Therefore, when it comes to branding the Netherlands, it is harder to emphasis on one specific industry, without downplaying other strong points that are perhaps equally important. Among others Rotterdam declared the creative industries as one of the spearheads of their regional development plan. The decision to devote special attention to the creative industries was a direct response to the popularity Richard Florida gained among policy makers around to world with the idea that creativity has gained more importance as a production function (OntwikkelingsBedrijf Rotterdam, 2007, p. 3). Specific attention is paid to architecture, design, music industry, and media. Especially in regard to architecture and urban planning Rotterdam sets the tone on an international level. The city also has a fairly strong national position on applied design, music and media (OntwikkelingsBedrijf Rotterdam, 2007, pp. 8-12). As Rotterdam is mainly known for its modern architecture, apart from its harbor,

it is relatively easy to position the city as modern, accessible for new businesses, and innovative. In that way the image of Rotterdam does not have to compete a lot with conflicting images.

The Dutch image on the other hand is much more multidimensional. On the one hand it is dominated by cultural heritage. Examples are the tulips, wooden clogs, and wind mills. Among mainly younger generations this view is supplemented by our liberal attitude towards drugs and prostitution. At the same time Dutch design is also a very successful export product. Although the traditional image still attracts many tourists, the Dutch government aims to establish the image that we are innovative and creative as well. These images might conflict, and therefore it is much easier to address general values that characterize the country, instead of specific amenities.

Yet, the Dutch traditional image based on cultural heritage does not necessarily conflict with contemporary or desired images. Often a link is made between these two, and it is stated that the one leads to the other. For instance, the worldwide known Delftware, which came about in the late 16th century, is often used as a source of inspiration for modern applied Dutch design.

5.2 Dutch International Cultural Policy & Creative Industries

5.2.1 Objectives

In the Netherlands international cultural policy has common ground on four ministries, i.e., the ministries of Culture, Education and Science (hereafter simply referred to as ministry of culture), Economic Affairs, Developing Aid, and Foreign Affairs. This multi-disciplinary approach implies that culture is attributed a variety of targets and values. In regard to the creative industries collaboration between these ministries takes place on several projects. Although the general goals on international cultural policy do not differ among the ministries, the emphasis per project and ministry involved does. For instance, the Ministry of Culture emphasizes the artistic exchange and development of artistic excellence. Point of departure for international cultural policy is the intrinsic value of artistic expression (Ministry of Culture, 2008a, p.

2). The Ministry of Economic Affairs obviously focuses more on the economic impact of culture, whereas the Ministry of Developing Aid stresses the bridging function of art and culture between people.

The general objectives for international exchange of art and art-related products are:

- Improvement and inspiration of Dutch culture
- Market development and connecting to international networks
- Live up to international standards
- Preservation of heritage and increase dialogue about shared history
- Strengthening cultural expression in developing countries
- Utilizing art and cultural expressions as a tool for diplomacy and international affairs (Ministry of Culture, 2008a, p. 2)

5.2.2 Stakeholders involved in International Cultural Policy in regard to the Creative Industries

The following section sets out the responsibilities and activities of the various actors that are involved in international cultural policy.

- The **Ministry of Culture** is responsible for the allocation of subsidies to Dutch cultural organizations that belong to the so-called 'basic-infrastructure', and supervision of the cultural funds. The department is also responsible for financing an internationally oriented basic infrastructure.
- The **Ministry of Foreign Affairs** is responsible for the approval of the annual accounts of the embassies in regard to their cultural program and the subsidy schemes of large cultural projects abroad, as well as the visitors/ trade missions. The Ministry also supervises the cultural institutes in Jakarta, Brussels, and Paris. These cultural centers administer their own budget to organize activities and exhibitions with the aim to present Dutch culture.
- The **embassies** have a facilitating function. They have a limited budget available for cultural policy. Instead of granting subsidies they have a

facilitating function, and among other things provide advise to funds, organizations, and individuals with international aspirations. In short, the embassies take up a bridging-position between the Dutch cultural sector and the local market.

- On behalf of the Ministry of Culture the **national cultural funds** allocate subsidies to individual artists and organizations that do not belong to the basic infrastructure. For all fields in the arts and heritage there are subsidy schemes available for fairs, travel costs for international tours, and representation of Dutch art abroad and exhibitions of art from other countries in the Netherlands. Cultural funds have been implemented in the following fields: performing arts (Fonds Podiumkunsten), design heritage and arts (Mondriaan Stichting), visual arts, i.e., individual artists (Fonds voor Beeldende Kunst, Bouwkunst, en Vormgeving, literature (Nederlands Letterenfonds), architecture (Stimuleringsfonds voor Architectuur), and film (Nederlands Fonds voor de Film). This list of cultural funds shows that many of the 'core' cultural industries are attended to. Although the Ministries apply a rather broad definition of the cultural industries (for instance advertisement and printing offices are included), and on paper a distinction between these sectors is not made, not all sectors are supported in the same way. In practice, the government does make a distinction similar to what I have suggested in section 3.1. For those sectors of which creativity is the foundation, there is a wide range of subsidy schemes and other forms of support available. Examples are architecture, designer fashion, and the film industry. Other sectors, more market driven creative industries, are supported in a different way. These are among other things provided sector information with the aim of increasing the ease at which firms can expand their business abroad.
- The **sector institutes** represent the sector and collect information with the aim to facilitate international cooperation.
- In addition to the activities of the funds in regard to international exchange, the **Stichting Internationale Culturele Activiteiten (SICA)** has been assigned to focus solely on internationalization. Among other things they provide a database with all international projects, with the

idea that cooperation can be increased this way. The foundation also directly assists with the coordination of international cultural projects; it supplies information about European subsidy schemes and the art market in other countries, and organizes debates and other events (Ministry of Culture, 2008a, p. 19).

5.2.3 Funding of Dutch Cultural Policy

The main tool that the Ministry of Culture has available to reach its goals with respect to cultural policy in general and international cultural policy in particular, is the allocation of subsidies to cultural organizations (Ministry of Culture, 2008a, p. 2). The importance of external and internal representation is stressed; policy is not only focused on developing Dutch culture in the Netherlands, but also how the country is presented abroad. In contrast to the Ministry of Culture, the Ministry of Economic Affairs does not allocate financial support directly.

As there are often many departments involved in international cooperation, it is hard to get an overview of the activities and outlay on certain matters. Homogeny Groep Internationale Samenwerking (HGIS) provides an insight into the expenditures of the government with respect to international policy. This includes among other things expenditures on the cultural field, especially those at which the Ministry of Foreign Affairs is directly or indirectly involved. For international exchange an annual budget is available of €8.8 million. Both the Ministry of Culture and that of Foreign Affairs administer €4.4 million. This includes the expenditures to DDFA, Sic, and major (sectoral) events (Ministry of Culture, 2008a, p. 17). Apart from expenditures indicated as HGIS-means, a lot more is spent on international cultural policy. Examples are expenditures on the cultural centers abroad, subsidies allocated by cultural funds, and the expenditures of organizations and individuals to perform an international cultural project, which are not reflected into the HGIS budget overview (Ministry of Culture, 2008a, p. 17).

DDFA

Although many creative industries are supported by means of the cultural funds as well, the program Dutch Design Fashion and Architecture takes up a

special position, as it is a cooperation between the ministries of Foreign Affairs, Culture, and Economic Affairs. All ministries involved annually reserve €1 million for the program Design, Fashion, and Architecture for the current period of government. This means that a total budget of €12 million is available for this program between 2009 and 2012. Internationalization is one of the main topics in this program. The program focuses at the moment especially on China, India, and Germany (Ministry of Culture & Ministry of Economic Affairs, 2009, p. 44) (Ministry of Culture, 2008a, p. 2).

5.3 Dutch Creative Industries & International Trade

5.3.1 Government Intervention into the Creative Industries; An Economic Perspective

In essence the role of the government is to solve coordination problems. If the market does not or insufficiently provide a certain good or service, the government steps in to facilitate the good concerned. By providing information, or direct or indirect financial support, the government is able to interfere into the market. The conceptual framework in this paper suggests that governmental policy has little influence on the image of a country. This is somewhat acknowledged by the governmental policy of the Netherlands in regard to international cultural policy. The policy of 2008-2010 deliberately chose to focus on sectors that are already strong, and financially successful. Especially designer fashion, applied design, and architecture receive attention have been indicated as one of the major spearheads for the next years. The question remains however to what extent these sectors, what already have a strong reputation abroad, need additional support?

The creative sectors (among others the arts, media, entertainment, design, architecture, computer games, designer fashion, and advertisement) are believed to contribute considerably to the economy, culture and society. Not only do these sectors create employment (at the moment 261,000 people have a job in these sectors, and the employment growth is above average), the economy also indirectly benefits from these creative sectors. It is also believed

that the creative industries contribute to the appeal of cities, not only for tourists and citizens, but also for firms. More closely defined this means that the creative industries are believed to contribute to (1) innovation and improvement of products, which in turn contributes to the competitiveness on a global scale of Dutch firms and products. (2) Improvement of neighborhoods, for instance by means of providing opportunities to youngsters in regard to art education. (3) Attracting tourists (especially through cultural heritage organizations and museums) (Ministry of Economic Affairs, n.d.). The Dutch government states that many of these creative sectors already have a rather strong position. Strengths of the Dutch creative industries include its flexibility and multi-disciplinary, the ability to combine design with technology, good creative education, and a strong reputation abroad. Yet, it is believed that these sectors do not adequately seize the opportunities that are available. The idea is that the process from the development of a concept to a product one can present on the market, is not dynamic enough in order to fully benefit from these chances. The weaknesses that have been identified are among other things a lack of coordination within the sub-sectors, a gap of knowledge about intellectual property rights, and a shortfall of entrepreneurial skills among creative people. The latter is considered to be due to the lack of attention creative education pays to entrepreneurship. Therefore it is considered to the role of the government to facilitate the cultural industries. (Ministry of Culture & Ministry of Economic Affairs, 2009, p. 27) In a joint venture with the Ministry of Economic Affairs, the Ministry of Culture defined its tasks as follows: increasing knowledge about intellectual property rights, stimulating research and entrepreneurship, increasing international scope for creative sectors, and increasing the access to capital, strengthening the infrastructure within the sectors (Ministry of Culture & Ministry of Economic Affairs, 2009, p. 37)

5.3.2 Dutch Policy on International Trade

Apart from the various expenditures on international cultural policy by the ministries of Culture, Foreign Affairs, and Economic Affairs, the latter also devotes much attention to the cultural industries as a way to boost the economy. The programs within international cultural policy include many of

the cultural industries, i.e., the ones of which creativity is a cornerstone. Although these programs have economic targets as well, the main objective is the increase of cultural exchange. The main tool that is applied is granting subsidies. Yet the importance of economic spillovers (market development and improvement of the country's image) is also mentioned. The Ministry of Economic Affairs also employs activities in regard to the cultural industries in the broadest definition with the aim to directly increase economic activity. In contrast to the Ministry of Culture, its main tool does not consist of direct financial support.

EVD International

The department within the Ministry of Economic Affairs that has been assigned to facilitate international entrepreneurship within all sectors is EVD International. Their main targets are stimulating international cooperation and establishing a positive image of the Netherlands abroad (Ministry of Economic Affairs, n.d.). The department functions as an intermediary between the business world, research and educational institutes, and governments on a national and international level. The key responsibilities of EVD International are (1) facilitating Dutch firms in regard to their international ambitions, (2) help to establish a positive image of the Netherlands abroad, (3) participate into the development of a healthy business climate in emerging and developing countries.

It should be noted however that it is hard to get a grasp of the structure and activities of EVD International, not only because there are so many divisions and subdivisions involved, but also because many of the departments have an overlap in activities or work together on certain fields. Also, recently some structural changes within the Ministry of Economic Affairs and its agencies were put through. The agency recently merged with SenterNovem and other agencies within the Ministries of Economic Affairs on innovation and economic development. The official name is now Agentschap NL, yet the name is not much established yet. Within EVD International there are several departments:

- Individual support for firms

- Programs & Innovation
- Program: To Develop
- Holland Branding & Foreign Investment
- Service & Advice

In order to give expression to the above-mentioned aims, EVD International employs the following activities:

- Sharing information about countries and its markets, with an emphasis on its economy and the main opportunities for Dutch organizations. Means of communication are the magazine *Buitenlandse Marten*, the websites www.agentschapNL.nl/evdinternationaal and www.internationaalondernemen.nl, seminars, and answering questions from organizations.
- Keeping in touch with sector institutions and knowledge centers in regard to sectors at which the Netherlands takes up a strong position on an international level. At the moment these are among others the water and maritime industry, food & flowers, and the creative industries. Although the department does not have many subsidy schemes available, it does indicate what subsidy schemes are available for Dutch organizations within these sectors. Together with sector institutions and knowledge centers within these sectors, EVD International presents the Dutch business and industry abroad. The main tool that is used for this is a common website (www.hollandtrade.com), which provides companies and authorities from other countries an insight into the Dutch economy and its businesses. Apart from collectively presenting Dutch sectors to interested parties, EVD International also uses the input it gets from the sector institutions and knowledge centers as a source of inspiration for policy.
- Specific branding activities include the annual *Made in Holland*, at which a selection of Dutch firms are singled out from several successful sectors, collective promotional activities, the website www.hollandtrade.com, and projects organized by the subdivision *Holland Branding*.
- Participating into incoming as well as outgoing trade missions

- Providing financial support as well as on subject matter to entrepreneurs and governments.

Holland Branding & Foreign Investment

Although the activities of Holland Branding & Foreign Investment are very much related and interconnected with the responsibilities of other subdivisions, the main difference is that Holland Branding and Foreign Investment only focuses on introducing Dutch firms and sectors to potential partners. This is in contrast to the other divisions, who are by and large involved with the development of own sectors and providing information about foreign markets to Dutch firms. The section Holland Branding & Foreign Investment consists of the following subdivisions:

- Netherlands Foreign Investment Agency, who concentrates on providing information to firms from abroad that potentially want to do business in the Netherlands (Netherlands Foreign Investment Agency, n.d.).
- Holland Branding, which in essence is the marketing department of EVD International as their main task is to get a consistent image of the Netherlands across.
- World Exhibitions

Wells and Wint (2000) focused in their influential research on the promotion of foreign investment and role of nation branding in attracting foreign investment. The authors argue that there are in general three objectives of investment promotion. Firstly, improve a nation's image within a targeted community. According to the authors this can be done by activities that are focused specifically on image building. Examples are advertising in (financial, industry- or sector specific) media, taking part in investment exhibitions, conducting investment missions, and providing information during seminars. Secondly, generate investment directly, for instance by means of direct mail. Finally, improve services to future and current investors. An example is providing investment-counseling services to potential investors (2000, pp. 19-22). EVD International mainly focuses on the first and the last type of activities. Within EVD International, Holland Branding is focused on the first

category of activities, and the Netherlands Foreign Investment on the last category.

Holland Branding

EVD International pursues to draw attention to the Dutch expertise in general, by means of Holland Branding. For Holland Branding an annual budget of €2.5 million is available (Ministry of Culture & Ministry of Economic Affairs, 2009, p. 45). Themes or slogans that were developed are "Made in Holland", and "Holland Pioneers in International Business". With these slogans the department strives to establish a sort of trademark for Dutch products and the way Dutch firms do business. The department strives to get these slogans applied as much as possible by third parties, with the aim to create unity in all different means of communications about the Dutch image. For instance, if successful Dutch enterprises disseminate their origin, then other firms will benefit from that. The same can be said for Dutch Design, which is a very strong brand abroad. The difference however between these brands is that the former has been imposed top down, while the latter developed naturally, and came about without intervention or what so ever. Yet policy makers have adopted Dutch Design as well. The department's main target is to develop Made in Holland and Holland pioneers in International Business as strong brands, by means of spreading these slogans at events and congresses, and embassies (Ministry of Economic Affairs, n.d.).

Netherlands Foreign Investment Agency

Although EVD International focuses on internationalization of Dutch firms in general, one of their focal points is the creative industries. EVD International developed a wide range of products, which are exploited by the stated subdivisions. For the Netherlands Foreign Investment Agency these include among other things a company directory for foreign companies, which makes it easier to find suitable partners for business, sector and market information, information about the Netherlands in general, and doing business in the country. Although these instruments were not specifically developed for the creative industries, much attention has been devoted to these sectors. Among others to sector information in regard to the creative industries in general, and

in particular architecture, design, and fashion, has been devoted much attention. Sector information consists of basic information, economic indicators, perspective and developments within the sector, organizational structure of the sector in regard to collaboration, to what countries export mainly takes place, and a list of the most important sector institutions.

5.4 Creative Industries & Increase of Tourism in the Netherlands

The Netherlands Board of Tourism and Conventions (NBTC) is an agency of the Ministry of Economic Affairs, and hence directly supervised and funded by the department. The NBTC applies the same logo as Holland Branding & Foreign Investment, i.e. a stylized orange tulip. This suggests a close cooperation or even corporate management. Yet this is not the case, the agencies hardly work together (Van Vulpen, 2010). The marketing campaign of the NBTC is directed towards countries whose citizens visit the Netherlands the most. Therefore the organization is mainly active in North America, Asia, and Europe. One of the main activities of the NBTC is providing market information in regard to tourism to Dutch organizations. For instance, the research department provides insight into the trends within the tourism industry, the profile of tourists that come to the Netherlands, and the affectivity of marketing campaigns. The agency does not only focus on the tourism industry, but also related sectors. Examples are the heritage field, festivals, sport events, natural environment and scenery (Nederlands Bureau voor Tourisme en Congressen, 2008, p. 6).

The agency applies a differentiated marketing strategy. In the first place a distinction is made between tourists from abroad and those from our own country. The agency does not only concentrate on potential visitors from abroad, but also on Dutch people. Apart from market segmentation on basis of origin, a distinction is also made between leisure and business travelers. Within these categories there are several themes that address the different aims one might have to visit the Netherlands. For leisure seeking tourists these themes are (1) Classics, which makes a reference to tulips, windmills, wooden

clogs, and cheese, (2) City Style, which focuses on the diversity of culture within the major cities, (3) Beach Life, which not only outlines the many (sandy) beaches, but also the Dutch wellness centers and large attractions nearby the coast, (4) Country Fun, which is oriented towards what to see and do on the country side, and (5) The Good Life, which is a mixture of the mentioned themes but then with an emphasis on activities and accommodation in the higher segment of the market. Apart from these themes, potential visitors have been categorized according to their motivation to travel, behavior, attitude towards life, and media use. A combination of these themes and categories has been developed to assist in choosing a marketing strategy (Nederlands Bureau voor Tourisme en Congressen, 2008, p. 9).

The approach of the NBTC complies with my vision of the way city branding and nation branding differs. On a national level general themes are addressed, while locally specific assets are emphasized. Cities or regions specifically address their highlights, for instance the Van Gogh and Rijksmuseum in Amsterdam, and the opportunities for devotees of water sport in Friesland. The creative industries do not play a significant role in the general policy of the NBTC. Yet they perform many projects that might be directed sometimes towards one or more of the creative industries.

5.5 Nation Branding in the Netherlands; A Stakeholders

Analysis

The case study provided a detailed insight into all parties involved in nation branding and what their objectives are. This section aims to schematically present all parties, and connect it to the conceptual framework. Section 4.1.7 I presented a model with the connection between nation branding / nation building, fluff / stuff, and intended / unintended effects. This model could be combined with a model on the stakeholders that are involved with a country's image in general, and specifically the parties involved in regard to the creative industries in the Netherlands.

		<i>Internal</i>	<i>External</i>
<i>Creates Image</i>	<i>Intended effect</i>	- Government departments who conduct nation branding policy	- Sector institutes of the creative industries. - Own citizens, firms, artists, and cultural organizations
	<i>Unintended effect</i>	- Government departments who conduct nation building policy - Politicians - Employees	- Sector institutes of the creative industries. - Own citizens, firms, artists, and cultural organizations
<i>Constructs Image</i>			- Other country's citizens and companies from abroad. - Own citizens and firms, artists, and cultural organizations

This model assumes that the internal stakeholders consist of the government departments who intentionally or unintentionally shape the image of a country. When an analogy is made to an 'ordinary' stakeholder analysis, it could be said that the role of the government similar to that of the firm, who watches over the brand image of the country. In the model a distinction is made between stakeholders who create or communicate a country's image, and those who construct/ perceive the image. Although branding theory does not make the distinction between internal/ external stakeholders, and parties who create/ construct the image, I believe it is relevant to do so as the roles within

these categories are rather different.

First, there are the departments of the Dutch government who deliberately conduct a nation branding policy. In the Netherlands these are Holland Branding & Foreign Investment, and The Netherlands Board of Tourism and Conventions. These internal stakeholders intentionally aim to shape the image. Second, internal stakeholders who unintentionally shape the image consist among others of departments of the government who aim to develop sectors. Examples are the ministries of Economic Affairs and Culture. It should be noted however that the policies of these ministries in many cases not only aims to develop a sector, but also to perpetuate the Dutch image. Other examples of stakeholders within this category are politicians and employees of the government. Thirdly, there are the external stakeholders who unintentionally affect the image. This category consists of sector institutes of the creative industries, Dutch citizens, firms, artists, and cultural organizations. This is a fairly large group of stakeholders, who above all realize their own targets and establishing their own image. The second group comprises external stakeholders who deliberately aim to foster the Dutch image. Many of the organizations and artists within the creative industries do not have a part in the nation branding policy. Yet there are parties, for instance the sector institutes and some major artists and organizations, which are actively drawn into the nation branding process. Even though their personal aim still is to establish their own image, in that way the effect of their activities on the image of the country shift from an unintended consequence to coordinated nation branding activities with an intended consequence. Finally, there are those parties who do not contribute to the establishment of a country's image, but instead construct it on basis of all means of communication about a country. Examples of these stakeholders are citizens, firms, artists, and cultural organizations not only from abroad, but also from the country itself. The latter group is communicator and constructor of the image of their own country at the same time.

In conclusion, the group of stakeholders involved in nation branding in the Netherlands is various. Not only a distinction can be made between external and internal stakeholders, I also made a division between parties who deliberately aim at establishing or altering the image abroad, and those who

indirectly have an influence on the way the country is perceived abroad.

Interestingly the latter group is much bigger and more influential.

6 Conclusion

My motivation to conduct research on the way the image of the Netherlands comes about in regard to the creative industries is twofold. On the one hand I was fascinated by the claim that the creative industries are regarded as the new engine behind economic development of the Netherlands. On the other hand I also noticed the trend that everything needs to be branded nowadays; not only are products branded, also persons entering the job market and even countries. In essence, the claim is that the creative industries - directly as well as indirectly - greatly contribute to the Dutch economy, regardless whether these are situated on the for-profit side of the spectrum or the artistic side. Their direct contribution consists of the economic transactions they perform, and subsequently the jobs and income that is generated. Their indirect contribution is believed to consist of spillovers in the form of inspiration to other sectors in regard to innovation and creativity. Also, these sectors somewhat represent the Dutch way of working and thinking, and in such, the creative industries are believed to contribute to a positive image of the country and its people. The fundamental question I subsequently asked myself was the question who shapes the image of the Netherlands and how does this process takes place, especially in regard to the creative industries. Before answering this question, I believe it is important to see how the creative industries are defined by Dutch government agencies, the nature of the various sectors that are regarded as creative industries, and the role they are assigned to. I think that it is hard to put every one of the so-called creative industries in one category. An analysis of the Dutch economic and cultural policy shows that the government does not make a distinction between the arts, the creative industries that involve much creative content, and the creative industries that are, so to say, located at the outer circle of the creative industries. Yet within the ministries not all creative industries are treated the same, and it looks like

a distinction is made between those that have cultural meaning, as well as economic value, and those that are mainly of interest for economic development. I would suggest making this distinction more clearly. If all these different sectors are put together in the same category, it does not do justice to the value of any of these sectors. In regard to the arts, it means that the cultural value is neglected. The traditional arts hardly generate any economic value, perhaps some in spillovers, but then it is still the question whether investments made into the arts are the most efficient way to create this economic value. From a strictly economic perspective it can be argued that an investment in another way would be more efficient. The result is that in this line of reasoning the cultural value is not taken into account at all. Of course it is not that black and white as the Ministry of Culture does stress the cultural values, yet there are major risks involved in the development that has been going on within the cultural sector. As policy makers in the Netherlands much emphasize the economic value (while hardly any is being generated), this is very risky for the cultural sector in general, especially with the upcoming major cuts in government expenditures that have to be realized during the next decade. If expenditures on culture are mainly accounted for by means of their presumed economic value, which is not a difficult argument to tackle, then the step is easily made to cut down on expenditures on culture, as the economic value is little anyway. For instance, the departure of the Giro d'Italia in Amsterdam in 2010 was mainly justified by the economic value it would generate for the city. When the real profit would be calculated, which is a hard thing to do as indirect economic value is very hard to address, then the opponents would win the debate. This is not a hypothetical issue in the Netherlands, as right-wing politicians at the moment argue to cut subsidies of the cultural sector, which is referred to as "leftish hobbies".

On the other side of the spectrum there are the creative industries that are in my opinion not really part of the creative industries. These are part of the production chain within the creative industries or the arts, but do not involve much creative content or intellectual property rights. Examples are advertisement and printing houses. In a way they operate at the boundaries of the creative industries, yet, as they do not really meet the definition of the creative industries, it would be better to leave them out. Otherwise the entire

economy could be included. One could argue these firms carry along with the trend of the creative economy. There can be no doubt that there is an ongoing trend of a shift from an industry-oriented economy towards one that has a mainstay on an exchange of information and creative processes. I would therefore suggest making a distinction between the development of the creative economy and the creative industries. The result of including marginal sectors within the creative industries, is that these are automatically attributed the characteristics of the 'core' creative industries, i.e., creative yet relevant for the economy. As the former hardly applies, it overstates the features of these not-so-creative industries. In conclusion, on the one hand there are the arts of which the economic value is overstated, and on the other hand there are the not-so-creative industries of which the cultural value is given too much weight to. As a distinction is already made in the way these sectors are treated in respect to the instruments that are made available, it would be logical and clearer to the organizations active within these sectors, to make this distinction.

Nation Branding Versus Product Branding

One of the first things I analyzed, were the differences and similarities between branding countries and products. Many general principles of branding theory that apply to all types of goods that are branded also apply to the process of branding countries. When a comparison is made between countries and brands, the conclusion is that a country is more like a corporate brand than a product brand as there are many different "products" a country has on offer. Corporate brands have, just like countries, a variety of 'goods' that are part of the same brand. The implication of this is that nation brands and corporate brands are much more complex as a variety of values and target groups are addressed. Yet, it is acknowledged by all scholars in the field of nation branding that the process of branding countries is much more complex than that of goods or corporate brands, as it involves much more (external) stakeholders.

Although there are many similarities between branding products and branding countries, there are also differences. Skinner and Kubacki (2007) correctly question to what extent nation-branding theory, which is almost

copied in full from the field of marketing and product branding, is relevant for branding countries. Yet one of the main differences between branding products and branding countries is that the former is equally concerned with product innovation and communication, while nation-branding strategies are more focused on communication. Of course product innovation or development of sectors does take place, but this is merely done by companies and individuals active in these sectors. Thus, in product branding there is a clear unity between the development of the product and the brand, while this is absent in the process of nation branding because there are much more external factors and stakeholders involved.

Secondly, the notion of nation branding suggests that it concerns a concept that involves a clear framework as point of departure. Yet, a closer look to nation branding-theory and the way it is implemented in the Netherlands, this hardly appears to be the case. The parties that are involved in nation branding activities are not only widespread; also most of the activities that are employed that can be regarded as nation branding do not have the aim to influence the image in the first place. Thus, the nation brand of the Netherlands is for the larger part a side effect of ordinary economic transactions.

Lanham observed that image, or 'fluff', nowadays plays a larger role in society than quality or 'stuff'. By this the author means that the actual product (i.e., the stuff) has become less significant, while everything around it, that is the fluff, has become more important. The trend that branding theory is applied to other fields fits this observation. Lanham's concept could be used to gain insight into the differences between nation building and nation branding. Nation building is more internally focused, as it is aimed to create a feeling among citizens that they belong to a nation. This process mainly involves the creation of assets or stuff. Nation branding on the other hand is mainly concerned with fluff. Nevertheless consultants within the field of nation branding stress that the concept does not only involve marketing campaigns. I support the viewpoint that image has become more important because of an information overload. This seems to be a paradox, but because the options to choose from have drastically increased, people base their opinion about something on little information. Thus, an information overload results into a

scarcity of attention. Although there is a need to compete to get attention, the danger of focusing too much on fluff, is that it might ring hollow if the message does not correspond to reality. Both nation branding and nation building are by and large the intended effect of government actions. There are however many other aspects that are of influence on the way a country is perceived, yet these are the side-effects of transactions within the market. This holds for nation building as well as nation branding. In case of the former, the market provides in the creation of assets, while the latter unintentionally shapes the image of the country.

In essence, the general viewpoint on nation branding is that the concept is rather similar to branding any other product. Nevertheless it depends what point of departure is taken, i.e., the marketing approach to nation branding or the public diplomacy stand, to what extent branding theory holds when branding countries. The marketing approach to nation branding takes general branding theory as point of departure. Although the public diplomacy viewpoint builds on existing literature on nation branding, there are some subtle, yet fundamental differences between these schools of thought. In short, whereas the marketing approach believes that an image of a country can and should be perpetuated or altered by means of policy, the public diplomacy viewpoint is rather skeptical about the extent a country's image can be deliberately influenced.

Communicators of the Brand Image

In regard to the question how the image of a country comes about, a distinction could be made between the means of communication of a country's image and factors that represent a country's identity. Interestingly, none of the authors make this distinction, which I believe is quite essential as the latter is not a means of communication on itself but instead something that is communicated. Although this is a subtle difference, this is among other things of relevance when framing policy on the matter. A factor that always should be kept in mind is the fact that any image, whether it is the image of a person, product or country, is always a simplified reflection of the true identity. Thus, it can be questioned to what extent these communicators of a country's image mirror the real identity, and how much it potentially influences the existing

image. It should be noted however that there is no general consensus of opinion on the factors that determine a nation's identity, nor what the communicators of a country's image are or how strong the effects are of these communicators. Examples of determinants of a country's identity are said to be its language, political identity, inherited traditions, religion, cultural symbols, geography, history, and "high" and "low" cultural expression. Communicators of the image are, among other things, the entertainment industry, media, art, music, famous citizens, sports, and proclamations. Another classification includes exported brands, policy decisions of authorities, people from the country itself, and cultural expressions, and the way foreign investment is stimulated. Yet, a clear distinction is not easy to make between these two categories, as some of the mentioned aspects are communicator and determinant of the image at the same time.

Stakeholders

As previously mentioned, nation branding has in common with product branding that there are many stakeholders involved. Yet the complexity of nation branding is higher. In regard to the stakeholders that are directly or indirectly involved with a country's image, a distinction can be made between internal and external stakeholders. Another categorization can be made of parties who intentionally or unintentionally affect a country's image. Clearly the group of stakeholders who unintentionally spread a country's image is much larger than the one who deliberately affects the image. Interestingly, some groups fulfill more than one role at the same time.

In regard to the cultural industries in the Netherlands, Dutch citizens, firms, artists, and cultural organizations unintentionally affect the way the country is perceived abroad by means of ordinary economic transactions on the market. For instance by performing abroad or conducting trade, of which it is not the direct intention to shape the country's image, indirectly the image of the Netherlands and its people is structured. At the same time the above-mentioned parties construct their own version of the national image as well, and in a way they derive their own personal image partly from the national image. In addition, some of these stakeholders are more or less part of the internal group of stakeholders, as they are sometimes directly included in

Dutch policies, and put forward as representatives of the Netherlands and its culture. Examples from the cultural industries are Victor G Rolf, DJ Tiesto and DJ Armin van Buren, Marcel Wanders, and Rem Kolas.

All these different stakeholders have equally diverse objectives, which do not necessarily comply with each other. For instance the main objectives of firms or individuals active in the cultural industries are establishing their own reputation and making a profit. These parties are often not as such concerned about their role in representing the Netherlands. Especially individual artists aim to show how innovative, progressive, or unique they are, and not how Dutch they are. A similar dichotomy can be found between the ministries in the Netherlands in regard to international cultural policy and the creative industries. Although the Ministries of Economic Affairs and Culture work closely together on the promotion of the cultural industries, different aspects within policy are stressed. The former gives emphasis, naturally, to the economic development of the sector and the interest of the whole economy of strong cultural industries. The latter goes along with Economic Affairs on that point, but of course accentuates on artistic exchange and development of artistic excellence.

The Dutch Approach to Nation Branding

In practice it turns out that (policy on) nation branding in the Netherlands is more scattered than one would think on a first glance. The concept consists of a vague model that involves a wide variety of topics. The only common ground between all these topics is the fact that they communicate directly or indirectly the image of the Netherlands. On most of these means of communication the government has little to none influence. What makes the concept also quite incomprehensible is the fact that the aim of activities is hardly ever to directly brand a country; on the contrary, most actions pursue the increase of direct foreign investment, tourism, or export. Also, nation branding is a very fashionable concept at the moment in the Netherlands, of which we will most likely not hear about anymore after another decade. That does not mean that activities which might be regarded as nation branding, will not be conducted anymore. Nation branding has always been done, or at least since international trade became a serious business. In essence only the name changed during the

course of time, but not the targets.

The activities that the Dutch government undertakes on a national level that might be regarded as nation branding are various. Yet, of most of these activities it is not the final goal to alter the way the country is perceived by the target audience. Instead, the activities aim to increase export, foreign investment, tourism, or cooperation on a diplomatic level. For instance, EVD International, the department within the Ministry of Economic Affairs that has been assigned to facilitate international entrepreneurship in general. Yet, for the larger part its activities are focused on the development of sectors. At this moment the creative industries is one of their areas for special interest. Within EVD International there are, however, two agencies that have been assigned to carry out policy on nation branding. These departments are Holland Branding & Investment and The Netherlands Board of Tourism and Conventions. Whereas other departments within EVD solely focus on (providing information and services to) Dutch firms, Holland Branding & Investment aims to bridge between potential investors from abroad and the Dutch market. On the one hand the department provides sector information to foreign investors, and on the other hand it aims to streamline the way other government agencies communicate about the country. Within the department a subdivision has been made between Netherlands Foreign Investment Agency, who executes the former task, and Holland Branding, who, so to say, fulfils the role of a marketing department and in that capacity it aims to streamline the way companies and other departments communicate about the country.

One of the first things that occurred to me while performing this research is that, although nation branding is an explicit goal and there are many government agencies involved in this process, it hardly takes place in a coordinated way. It seems that nation branding in the Netherlands is like a patchwork, at which many parties (i.e., departments, sub-departments, cities and regions, but also individuals and companies) perform intentionally or unintentionally activities that can be regarded as nation branding. In theory nation branding consists of a coherent strategy, but I would say policy on nation branding in the Netherlands is all but clear. In regard to government policy, it is rather difficult to grasp which department in practice carries out policy on nation branding. It turns out that a wide variety of departments and

sub departments are involved, who all have a role in this process. The ambitions stated by the Ministries of Culture and Economic Affairs seem quite straightforward, and it sounds quite logical that a strong Dutch image contributes to the image. Yet, one of the things I found out is that the activities are not necessarily coordinated; on the contrary. Nevertheless the influence these activities assumed to have on the image of a country, are constantly stressed by the agencies involved. For instance, Amsterdam hosted the Giro d'Italia not because it would provide entertainment to many people; according to the city it should be seen as a return on investment as it would draw much positive attention Amsterdam, which would translate itself into an increase of direct foreign investment, international trade, and tourism. I believe however this is more because at the moment nation branding is very much into fashion. As the public diplomacy stand on nation branding points out, nation branding is not a new concept. Countries always tried to improve their image, but it was never called nation branding.

Thus, in conclusion, to answer the question who shapes the image of a country in general, and in particular the Netherlands, I would say the image is by and large the unintended consequence of actions of individuals within the market. Not only is nation branding policy in the Netherlands scattered, also the group of stakeholders who unintentionally shape the image of the country is much larger than the group who deliberately aims to shape it. To what extent it is believed that Dutch policy can make a difference, depends on the point of departure that is taken, i.e., the marketing viewpoint to nation branding or that of public diplomacy. Seeing that the public diplomacy viewpoint to nation branding hinges much less on marketing theory than the marketing approach to the matter, and much more an eye for the complicated nature of nation branding, I am inclined to follow this line of reasoning. Therefore I believe policy has little influence on the way people abroad think about the Netherlands.

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