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Competition & Transition:

Divergent Approaches to Nation Branding in Estonia and Latvia

Konkurencyjność i Zmiana:

Rozbieżne podejścia Estonii i Łotwy do budowania tożsamości marki narodowej.

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Abstract

In the early 2000s, Estonia and Latvia adopted nation branding strategies as a means of progressing their transition towards becoming European Union and NATO member states. While both states inherited very similar regional identities centred on a Baltic regional grouping, Estonia and Latvia diverged in their incorporation of this Baltic regional identity into their nation branding strategies, with Latvia foregrounding its Baltic identity while Estonia demonstrated a pivot towards a Nordic identity, while minimising Baltic dimensions. While previous research in this field has predominantly taken a country-by-country approach to nation brand analysis, this paper takes a comparative content analysis methodology in order to identify differences across strategies over time. Through a content analysis of nation branding materials issued by Estonia and Latvia between 2001 and 2020, this paper demonstrates that these countries have adopted strongly differing postures in their nation branding strategies with regards to a Baltic identity. In contrast to other work on this topic, this paper situates the choices made in producing these nation branding strategies in their historical, cultural and economic context in order to draw conclusions as to how a Baltic identity is perceived as being competitive or uncompetitive by those branding Estonia and Latvia. This paper argues that, rather than being singularly reliant on the vision of nation branding professionals, as is often the criticism levelled at the practice of nation branding, the Estonian and Latvian nation branding strategies are constructed through a process of negotiation between governments, citizens, and branding professionals to produce a brand that maximises competitiveness through product differentiation to regional neighbours, creating a state of imperfect competition within the regional marketplace of nations.

Abstrakt

Na początku XXI wieku Estonia i Łotwa przyjęły narodowe strategie budowania świadomości marki (brandingu) jako środek do akcesji do Unii Europejskiej i NATO. Podczas gdy oba państwa odziedziczyły bardzo podobne tożsamości regionalne skoncentrowane na regionie Morza Bałtyckiego, Estonia i Łotwa różnią się, jeśli chodzi o uwzględnienie tej bałtyckiej tożsamości regionalnej w swoich narodowych strategiach brandingowych. Łotwa postawiła na pierwszym miejscu swoją bałtycką tożsamość, podczas gdy Estonia zwróciła się ku tożsamości nordyckiej, jednocześnie umniejszając bałtyckim wpływom. Podczas gdy poprzednie badania w tej dziedzinie obejmowały głównie podejście do analizy marek narodowych w poszczególnych krajach, w niniejszej pracy zastosowano porównawczą analizę treści w celu zidentyfikowania różnic między strategiami. Poprzez analizę treści krajowych materiałów brandingowych wydanych przez Estonię i Łotwę w latach 2001–2020, praca ta ukazuje, że kraje te przyjęły bardzo różne stanowiska w krajowych strategiach brandingowych w odniesieniu do bałtyckiej tożsamości. W przeciwieństwie do innych prac na ten temat, niniejsza sytuuje wybory dokonane przy tworzeniu narodowych strategii brandingu w ich historycznym, kulturowym i ekonomicznym kontekście, aby wyciągnąć wnioski na temat tego, jak tożsamość bałtycka jest ukazywana przez te marki (jako konkurencyjna lub niekonkurencyjna). W niniejszej pracy argumentuję, że zamiast polegać na wizji specjalistów zajmujących się brandingiem narodowym, strategie brandingu narodowego w Estonii i Łotwie budowane są w drodze negocjacji między rządami, obywatelami, oraz specjalistami od brandingu, aby stworzyć markę, która maksymalizuje konkurencyjność poprzez różnicowanie produktów wśród regionalnych sąsiadów, tworząc stan niedoskonałej konkurencji na regionalnym "rynku narodów".

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Introduction

A discourse that has emerged from the technical-economic literature around nation branding which has concerned itself with elaborating the distinction between a 'nation brand' as a passive construct, 'nation branding' as a practice, and a 'nation brand' as a more active product of the practice of nation branding. This is to say that this paper will seek to differentiate these two forms of nation brand in a manner consistent with Simon Anholt's assertion that all countries have a brand, whether or not they have been branded, but that through a process of nation branding, these brands can be reshaped in order to enhance their competitiveness in the international marketplace.[1] However, the breadth of what may legitimately be considered to constitute a nation brand under both models proposed above incorporates a vast spectrum of cultural and historical artifacts that may be subjected to analysis according to the desired approach to the research question at hand.

The first model of nation brand can be characterised as a passive brand that coagulates around a nation through an accumulation of historical, geographical and cultural factors without any concerted or deliberate attempt on the part of a government. Factors that may shape such a brand include forces as broad as the economic system in place there (is the country capitalist or communist? Does it have a relatively high or low GDP per capita?), geography (is it thought to have nice beaches or mountains that are good for skiing?), or its people (are they kind and hospitable, or cold and unfriendly?). However more specific factors can also play a disproportionate role in how passive brands develop in the international imaginary. National cuisine, or even a particular dish, can become a touchstone for a nation's entire passive brand (to speak about Italy without mentioning pizza is unthinkable); music can perform a similar function, as the surge in popularity of K-Pop music has demonstrated for South Korea. Even a particular artist or author can shift or solidify the international perception of a nation with minimal, if any, coordinated government effort (think of how strongly the Spice Girls or David

[1] S. Anholt, 'Branding Places and Nations', in R. Clifton (ed.) *Brands and Branding*, Economist Books, London, 2009, p. 2013.

Beckham shaped the international perception of the United Kingdom in the 1990s, or how the works of JK Rowling have achieved the same more recently).

The challenge in assessing this form of nation brand, as mentioned above, is that due to its rather nebulous nature it is difficult to draw boundaries around what materials should be included in an analysis. Secondly, due to the fact that these passive brands have, by their very nature, developed organically, we are unable to derive useful data from a direct analysis of them when we are seeking to address a research question targeted at perceptions of competitiveness with regards to regional identity. It is far more useful, in this sense to examine the way in which active brands engage with these passive brands in order to address perceived weaknesses in competitiveness.

These 'active brands' are those which are developed with direct coordination of a national government, often through a dedicated public-sector agency. These brands are frequently developed with particular strategic objectives in mind, such and improving rates of foreign direct investment in the country, increasing tourism, increasing trade flows and so forth. However, the challenge for many states is to approach the process of developing a nation brand from the perspective of 'rebranding,' rather than thinking of 'nation branding' as a greenfield process. While some nations have a strong brand (France, Italy) and some nations have comparatively weak brands (Uruguay, Lesotho), and others have strongly positive brands (Sweden, New Zealand) while others have strongly negative brands (Iraq, Afghanistan), it is important to remember that these nations all have pre-existing brands irrespective of whether or not they have *been branded*. In undertaking to 'brand' their nations, governments are (whether purposefully or incidentally) seeking to re-shape these pre-existing, passive brands. An examination of this form of active nation brand is potentially far more fruitful when seeking to address questions of competitiveness and regional identity as it contains an inherent element of volition on the part of the state that is absent from its passive counterpart. That is to say, we can make the assumption that the content of an actively constructed nation branding strategy has been included for the purpose of improving the competitiveness of that nation in the international marketplace, and those elements that have been excluded have been deemed to be subordinate in terms of their competitiveness.

Furthermore, it is important to establish that a nation brand cannot be developed in a vacuum. A successful and credible brand should acknowledge and incorporate discourses at all

levels of identity in order to provide consumers with a cohesive impression of what the brand represents. While the term 'place branding' is often used as an umbrella term for branding at sub-national, national, and supranational (ie: regional) levels, it is not used to explain any intersectionality that occurs between these layers of branding. Yet, while these levels are most commonly treated as distinct and handled by different actors with differing agendas and objectives, the boundaries between them are more porous than it may initially appear. While this paper takes as its starting point the idea of a 'nation brand' or a 'competitive identity', it seeks to examine the interactions between a national and regional brand and interrogate the dominant understanding of these layers as mutually exclusive.

The most visible layer in this sense is branding at the national level, which constitutes the bread-and-butter of the nation brand, and also most directly relates to the object of the branding message being transmitted. The six branding vectors represented by the six corners of Anholt's hexagon of competitive identity are concentrated at the national level and are not often examined in terms of their externalities. For example, Anholt states that policy is one of the six cornerstones of a national competitive identity. While this is certainly true for policy areas such as welfare, healthcare, education and so forth, in policy areas such as foreign and European affairs, for example, a country's policies towards its neighbours becomes an extension of the nation brand by setting the boundaries of regional groupings. This will be examined in greater detail in the following chapters; however, it is worth noting from the outset that in most cases a nation brand cannot be clearly distinguished from the brands carried by supranational regional groupings to which that country either belongs or is adjacent to.

However, in some cases the interaction between a national and regional level of branding is expedited by a more active process of mutual competitive identity construction, as we can observe such instances as Latvia's 2018-2019 presidency of the Council of Baltic Sea States during which time it prioritised the development of a more robust regional identity for the Baltic Seas States as a core objective of its tenure.[2] In this instance, Latvia elevated a national policy objective to a supranational level in order to bolster the credibility of efforts being undertaken at home. Very little has been written about the incorporation of supranational identity markers into

[2] Ministry of Foreign Affairs of Latvia, *Latvian Presidency of the Council of the Baltic Sea States 2018/2019*, Ministry of Foreign Affairs of Latvia, Riga, 2018, <https://www.mfa.gov.lv/en/policy/latvian-presidency-of-the-council-of-the-baltic-sea-states>, viewed 20 February 2020.

a national branding strategy. This paper will seek to identify the points at which the national branding strategies of Estonia and Latvia interact with these broader regional identities, how they are operationalised in context, and what competitive objectives are served through this approach.

Chapter I:
Nation Branding as Methodological Challenge

1.1 Research Problem & Questions

As a result of their common annexation to the Soviet Union, Estonia and Latvia carried similar passive nation brands upon their return to independence in the early 1990s. In order to progress their aspirations as independent states, both sought to introduce themselves to the international community and enhance their competitiveness through the development of actively managed nation brands. Estonia, the first among the Baltic states to formulate a nation brand, foregrounded qualities of Nordicness in its branding strategy, while downplaying qualities of Balticness. Latvia, by contrast, took a stance that promoted continuity of a more widely accepted Baltic identity. This stark divergence reflects the values attributed to 'Balticness' by Estonia and Latvia as the foundation for a competitive identity, while operating within the conventions and professional practices of nation branding.

This thesis will seek to address the following questions:

How and why have the Baltic states engaged with the practice of nation branding?

The reasons that nations engage in the practice of nation branding are many and varied and can be influenced by a range of factors including wealth, geography, or political system. Estonia and Latvia adopted their nation branding strategies at the end of the first decade following the collapse of the Soviet Union. This paper will identify some of the reasons that Estonia and Latvia opted to pursue a nation branding pathway, how they interpreted the practice of nation branding in a way that served their immediate goals and ambitions at the time, and if and how their approaches have changed since the early 2000s.

What is the place and function of regional identities in the branding strategies of the Baltic States?

Due to their common history, including their annexation to the Soviet Union, their regaining of independence at the same time, and their simultaneous accession to the European Union and NATO, Estonia, Latvia, and Lithuania are often considered by external observers to constitute a regional grouping under the name 'the Baltic States.' This shared identity within the international imaginary would suggest that any nation branding effort undertaken by these states within an international forum would in some way interact with this regional identity. However, states, as with any branded product, often use branding to reshape the way they are perceived outside their borders. This paper will examine how regional identities are incorporated into the branding strategies of Estonia and Latvia, and what purpose they serve in this context.

What can this tell us about the perception of regional identities in the Baltic Sea region as an element of a competitive identity among those responsible for branding Estonia and Latvia?

Ultimately, decisions around brand direction are made by people, and these choices reflect value judgements made by those people with respect to competitiveness. The way in which Estonia and Latvia incorporate a regional identity into their nation brands can be read as a manifestation of these choices, and a reflection of the way in which these people perceive particular regional identities to be competitive within the international marketplace of nations. This paper will examine the ways in which regional identities are woven into these strategies in order to identify the reasons for their usage, and divergences in their usage between strategies.

1.2 Explaining Nation Branding as a Meaningful Process of Changing Perception – Methodological Premises

From a methodological perspective, an active nation brand constitutes a far more straightforward subject of analysis as it is, for the most part, constructed through a discrete unit of materials produced by a clearly defined author or group of authors, and transmitted and reshaped according to a relatively linear chronology. This is the case for both Estonia and Latvia, however their pre-existing passive brands have required more extensive treatment in the shaping

of their active brands due to a unique set of factors arising from the collapse of the Soviet Union in the early 1990s. This will be dealt with in further detail in subsequent chapters.

With regards to the question of materials that will be analysed within this paper, a number of both internal and external factors must be taken into account when determining the scope of what should be included. This paper will take as its sample the initial strategy documents developed for both the Estonian and Latvian nation branding strategies, in both cases dating from the early 2000s. These documents are directly comparable as they were produced at not only the same time, but at the same phase in the development of both strategies. As they were developed for internal use and not as public-facing materials, they are also far more explicit in their description of development and selection processes for themes to be included in the respective strategies than the subsequent materials.

The second round of qualitative content analysis will move forward to the current set of nation branding materials issued by both countries and which are being actively distributed and promoted at time of writing. Through a comparative analysis, this paper will seek to identify shifts that have occurred in the intervening twenty years in terms of how Estonia and Latvia have engaged with a Baltic regional identity. This analysis will take as its subject the materials currently available to the public digitally through the websites of the agencies responsible for the custodianship of Estonia and Latvia's nation branding projects (Brand Estonia and the Latvian Institute, respectively). However, due to the broad uptake of new digital platforms across which nation brands are projected, this analysis of more current materials will be expanded to include an examination of the media selected by Estonia and Latvia. To paraphrase McLuhan, the medium in this instance is more revealing than the message and can illustrate important regional divergences in the performance of nation branding beyond that facilitated by a conventional content analysis.[3]

It is also worth noting that initial plans for this paper included work on intermediate stages of development of Estonia's and Latvia's nation brands between the early 2000s and the present day. As the relevant materials associated with these stages are no longer available online (having been superseded by more contemporary materials), field research was planned to Tallinn and Riga to collect these materials from the archives of the relevant agencies. However, for

[3] M McLuhan, *Understanding Media: The Extensions of Man*, MIT Press, Cambridge, Massachusetts, 1964, pp. 7-22.

reasons of public health and associated travel restrictions, this was no longer feasible. These intermediate analyses were intended to track waypoints in the development of these strategies across time in order to give a more granular understanding of when divergences occurred. However, by taking only the first and most recent packages of materials, we are still able to identify these divergences, examine change across time, and draw valid conclusions about how shifts in perception of the competitiveness of regional identities in the Baltic region, if they have occurred, have been incorporated into nation branding strategies by Estonia and Latvia. It is hypothesised that, had these materials been included, they would have demonstrated consistent messaging across time with regards to the Baltic or Nordic alignment of Latvia and Estonia within the content of the strategies, however they would likely have reflected a gradual shift away from the Central and Eastern European modes of delivery of these messages and towards the digitally-oriented 'toolbox' media that characterises the Nordic model. Further research may be required at a more appropriate juncture in order to affirm or disprove these assumptions.

In order to perform the qualitative content analysis on these materials, a coding framework was prepared that included a range of thematic containers into which relevant passages of text from the selected documents were placed. These included: discussions of nation branding practices; mentions of Estonian or Latvian qualities (as applicable); descriptions of brand mechanics; and mentions of Nordicness or Balticness. The approach to categorising these excerpts was grounded in a critical content analysis mode. Acknowledging that many of the key terms that are crucial to an accurate analysis of the materials are highly context-dependent, these terms were included in the coding sheet situated in a portion of text that allowed their intended meaning to be incorporated into the coding process. For example, the term 'Baltic' can be, and is, used in either a geographic, hydrographic, or abstract identity sense. For this reason, a purely quantitative approach would be insufficient for an examination of the relationship between geography and identity that underpins the divergence in Estonian and Latvian nation branding strategies as the data would offer no differentiation between these usages.

As described in greater depth in Chapter IV, the challenge in applying this methodology to more recent iterations of the Estonian and Latvian nation brands is the increasing uptake of digital modes of delivery of nation branding materials, and the associated proliferation of multimedia nation branding practices has resulted in a less linear nation branding product and one that is more dependent on users' engagement with materials. Consequently, the methodology

was adapted for the analysis of these materials in order to effectively delineate core branding materials from secondary materials such as blog posts and news articles that have been co-located with branding materials on the nation brands' dedicated websites. Furthermore, the shift towards digital nation branding has produced new ways for countries to perform nation branding that are substantively different to those in place in the early 2000s. For this reason, the methodology was adapted in order to produce comparable results.

1.3 Definitions and Hypothesis

As a stream of academic inquiry still in its relative infancy, many key terms within the field of nation branding research are subject to debate. It is crucial, then, to establish working definitions for a number of the terms that will occur frequently throughout this paper and outline how they will be used in context.

The first and, unequivocally, most important of these is 'nation branding' itself. The Term 'nation branding' is widely credited to Simon Anholt who, in the 1990s, began to develop nation branding as a professional practice and field of research. In 1998 Anholt published his highly influential paper *Nation-Brands for the Twenty-First Century*, which outlined his thoughts on how developing a brand at a national level that can be exported alongside hard products can expedite the transition of developing countries into middle-income countries.[4] While the substantive content of the paper was, and remains, an important work in the early canon of nation branding research, it was the introduction of the term 'nation branding' into the discourse on the subject that is still most widely felt today.

However in the intervening years, and as criticism has accumulated around the concept of nation branding and the practices of those professionals branding nations for their perceived undemocratic qualities, some (including Anholt himself) have opted to distance themselves from the term and, in its place, a range of direct alternatives and adjacent concepts have been proposed. The most fully realised direct alternative to 'nation branding' was also proposed by Anholt, and this is the concept of a 'competitive identity'. This concept was first outlined by

[4] S Anholt, 'Nation Brands of the Twenty-First Century - Simon Anholt', *Journal of Brand Management*, vol. 5, no. 6, 1998, pp. 395–406.

Anholt in his 2007 monograph of the same name. In this work he describes the necessity for those branding nations and those studying these practices, to expand their focus beyond the strictly corporate approach adopted a decade earlier, and to think about the process as having "more to do with national identity and the politics and economics of competitiveness than with branding as it is usually understood".[5] What we must bear in mind, however, is that this shift from 'nation branding' to 'competitive identity management' was advocated for by a leading marketing and branding professional at a time when mounting criticism was being levelled at nation branding by the likes of Aronczyk, who drew attention to its top-down, non-participatory practices.[6] In fact it is very difficult to distinguish between Anholt's initial understanding of what nation branding is and how it should be executed, and his revised understanding under the 'competitive identity' label. It appears plausible, then, that Anholt's intervention is merely an act of meta-rebranding in which the author attempts to create a new and more competitive identity for nation branding itself. For this reason, this paper will use both the terms 'nation branding' and 'competitive identity,' This paper will take as its working definition of 'nation brand' from Keith Dinnie, who asserts that this term is used, in the field of nation branding research, to denote "the unique, multi-dimensional blend of elements that provide the nation with culturally grounded differentiation and relevance for all of its target audiences."[7] 'Competitive identity' will refer to those elements referred to above when situated within a system of economics of competitiveness and informed by such a system. In cases where a high-level, generic term is required, 'nation branding' will be used as a catch-all due to its status as the most widely accepted term in current discourse.

Similarly, the terms 'brand,' 'branding,' and 'branded' all assume very particular meanings within the context of nation branding research. This definition is particularly useful as it does not seek to incorporate any reference to the practice of branding, nor does it seek to differentiate between brands that have been acquired through historical and cultural processes (what we will refer to as 'passive' brands) and those which have been actively constructed for the purposes of improving competitiveness ('active' brands).

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[5] S Anholt, *Competitive Identity: The New Brand Management for Nations, Cities and Regions*, Palgrave Macmillan, New York, 2007, p. xi.

[6] M Aronczyk, '"Living the Brand": Nationality, Globality and the Identity Strategies of Nation Branding Consultants', *International Journal of Communication*, vol. 2, 2008, pp. 41-65.

[7] K Dinnie, *Nation Branding: Concepts, Issues, Practice*, Butterworth-Heinemann, London, 2008, p. 5.

This brings us to the second word within this set that requires further definition: 'branding.' This term will be used in both its natural senses during this paper: both as a noun, and as a verb in the present participle. The former refers to the formal aspect of the nation brand strategy, including the visual and textual elements, and the foundational identity markers, that constitute a consciously constructed and applied set of materials produced to promote and enhance a nation's competitiveness outside its borders. The latter refers to the conscious act of constructing a brand, as exemplified by the actions of both the Estonian and Latvian governments as will be described in subsequent chapters.

More specifically for this paper, the terms 'Balticness' and 'Nordicness' are used throughout to refer to the idea of a set of cultural, historical and political qualities or characteristics that act as a type of 'glue', creating a bond between the states that share these qualities.[8] Each term has historically been used in a variety of ways according to its purpose, and its user. For example, during the 2007-2008 Latvian presidency of the Council of Baltic Sea States, Latvia sought to leverage the idea of 'Balticness' as an identity common to all the Baltic Sea states.[9] [10] However 'Balticness' is considered to be most commonly associated with the three Baltic states, and for the purposes of this paper the term will be used to describe the perceived shared identity as it relates to these three states.

The term 'Nordicness' operates slightly differently, however, as its meaning in the sense that it will be used in this paper, is constructed largely through appropriation and operationalisation outside of the territory to which it refers. Lagerspetz characterises this as a set of socio-political qualities inherent in the Nordic countries (Denmark, Sweden, Norway, and Finland) with which the Baltic states share a 'problematic' relationship.[11] Such qualities can include a common language family (with the exception of Finland), a strong social security model, similar political and legal traditions, a history of gender equality, and a Lutheran religion. Together these characteristics can be considered to constitute, among others, the pillars of

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[8] T Herrschel, *Borders in Post-Socialist Europe*, Routledge, London, 2016, p. 91.

[9] The term 'Baltic Sea states' is used to distinguish all states sharing a Baltic coastline (Denmark, Estonia, Iceland, Latvia, Poland, Lithuania, the Russian Federation, Finland, Sweden, Germany, and sometimes Norway) from the smaller sub-grouping 'Baltic states' (Estonia, Latvia, and Lithuania).

[10] N Götz, 'Introduction: Collective Identities in Baltic and East Central Europe', in N Götz (ed.), *The Sea of Identities: A Century of Baltic and East European Experiences with Nationality, Class, and Gender*, Elanders, Stockholm, 2014, p. 14.

[11] M Lagerspetz, 'How Many Nordic Countries?: Possibilities and Limits of Geopolitical Identity Construction,' *Cooperation and Conflict*, vol. 38, no. 1, 2003, p. 57.

‘Nordicness’ as an identity marker. However, the term is also operationalised in a variety of more specific ways; for example, to refer to an aesthetic as being in possession of ‘Nordicness’ through its use of a ‘Nordic’ colour palette. This paper will, through its examination of the claims for or against ‘Nordicness’ as a competitive concept made in the Estonian and Latvian nation branding strategies, seek to identify contextualised instances of the usage of this term in order to arrive at a functional understanding of how its meaning is constructed and deconstructed through its usage *in praxis*.

It is anticipated that, through qualitative content analysis, the results will demonstrate a tendency for each state to adopt a posture in its nation brand oriented towards what it perceives to be the most competitive regional identity available to it, within the scope of what is credible in the eyes of consumers and while maintaining consistency with standards of authentic culture and identity defined largely by a domestic audience.

Chapter II:
Theoretical Foundations of the Concepts and Practices of Nation Branding

2.1 Academic and Professional Perspectives on Nation Branding

In its most essential form, the idea of nation branding has been in existence for many years; nations have long attempted to shape their image abroad to improve their competitive edge. However, it has only been in the last twenty to thirty years that this practice has become systematised and theorised. Consequently, nations have been reimagined as commodities, struggling for market share within the global marketplace of nations.[12] Since the mid- to late-1990s a body of literature has emerged to explain this phenomenon, with most works falling into one of two distinct categories: the academic, and the professional.

The latter of these has undoubtedly achieved the most widespread recognition, with high-profile nation branding practitioners describing their working practices in detail. Among these, two authors have contributed an extensive and influential body of work describing the processes and methods employed by these professionals: Simon Anholt, and Wally Olins.

The emergence of nation branding as the subject of academic inquiry is attributed by some to Anholt's 2003 book *Brand New Justice: The Upside of Global Branding*. In this work, Anholt primarily explores the intersection between nation brands and the corporate sector, examining the effect of the former on the competitiveness on branded exports in the global market, and the role of the latter in perpetuating the idea of the nation through its perpetuation of the consumer fixation on 'country of origin' as a shorthand for quality.[13]

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[12] J Schwak, 'Branding South Korea in a Competitive World Order: Discourses and Dispositives in Neoliberal Governmentality." *Asian Studies Review*, vo. 40, no. 3, 201, pp. 426–443.
[13] S Anholt, 'Brand New Justice: The Upside of Global Branding', Butterworth-Heinemann, Oxford, 2003, pp. 79-107.

The scope of this thesis extends to the nation branding efforts of Estonia and Latvia following the collapse of the Soviet Union in 1991 and their subsequent ability to shape their own, independent nation brands. However, it would be remiss not to address the question of Lithuania's exclusion from this study, particularly as this thesis seeks to engage with the concept of 'Balticness' in Estonian and Latvian cases. The answer to the question 'why not Lithuania?' is relatively straightforward: while both Estonia and Latvia have, over time, launched and developed their respective nation branding strategies, Lithuania has never progressed far beyond the first step. It has, at various points, launched and relaunched a range of strategies but has never been fully able to carry any of these through to what might be considered as a fully realised nation brand. This is particularly surprising as Lithuania was an extremely early adopter of the practice, with its first documented attempts at what would now be considered nation branding coming as early as 1919 when it procured the services of Austrian public relations pioneer Edward Bernays to promote Lithuanian independence in the United States.[14]

Nadia Kaneva identifies two approaches to nation branding, based on their intensity and scope: 'cosmetic' nation branding, based primarily on the launch of logos or slogans as part of a stand-alone marketing campaign; and a deeper form of nation branding that seeks to incorporate a more fully-realised branding strategy into state and even non-state structures, and is often characterised by the establishment of a quasi-governmental agency entrusted with the custodianship of the brand.[15] While both Estonia and Latvia have managed to achieve the latter (through the establishment of Brand Estonia and the Latvian Institute, respectively), a Lithuanian equivalent, the Lithuanian Development Agency, was established in the late 1990s before being dissolved into two new public-sector agencies in 2010. While The Lithuanian Development Agency was tasked with taking an holistic approach to improving Lithuania's image abroad, the two agencies that replaced it, Invest Lithuania and Enterprise Lithuania, take a narrower, more business and investment focus than their predecessor, and therefore cannot be considered to be truly nation branding agencies.[16]

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[14] B Ociepka, 'A New Brand for Post-Communist Europe', in Carolin Viktorin, Jessica C. E. Gienow-Hecht, Annika Estner, Marcel K. Will (eds.) *Nation Branding in Modern History*, Berghahn Books, Oxford, (2018, pp 197-220.

[15] N Kaneva, 'Nation Branding: Toward an Agenda for Critical Research, *International Journal of Communication*, vol. 5, 2011, p. 118.

[16] Lithuanian Development Agency, 'Country Profile; and Foreign Investment & International Trade', in M Terterov & J Reuvid (eds.), *Doing Business with Lithuania,* GMP Publishing, London, 2005, pp. 3-37.

A core focus of this paper will concern states' abilities to rebrand themselves, particularly following significant moments in their historical trajectories, in order to meet certain political, social, or economic aspirations. However, one would struggle to identify any voices within the nation branding literature that would assert that these objectives could be achieved solely through the construction of a robust nation brand. In her 2018 paper on the functioning of nation brands within the international media landscape, Kaneva asserts that we should, instead, view these brands as "simulacra which exist within a transnational media system for the creation, circulation and consumption of commodity-signs. In this capacity, nation brands shed their representational burden of standing in for the nation and, instead, operate as self-referential entities."[17] This theorisation of the role of nation brands is particularly prescient when discussing the interaction between a broader concept (in this case, 'Balticness') and the brand itself as it allows us to acknowledge that it is entirely possible, and in many ways preferable, to examine these brand constructs in the knowledge that they are not intended to accurately represent the experiential reality within the location being branded. The objective of nation brands is to construct an agreement reality, or a personality in the international imaginary based primarily on consensus among those receiving the branding message.

Kaneva's work in conducting a thorough meta-analysis of the literature in this field also assists in creating a taxonomy of nation branding research.[18] In this model, there are three categories into which the majority of academic works in the field of nation branding can be situated: technical-economic, political, and cultural.

The technical-economic category is defined by the analysis of the mechanics of brand design and implementation. This approach is most closely concerned with corporate marketing practices and their application to states. Kaneva calculates that 57% of nation branding studies adopt an approach that most closely aligns with this category. Papers that adopt a technical-economic approach are most likely to be written by nation branding practitioners, or academics with a specialisation in marketing studies. The broad conceptualisation of nation branding within this framework envisages nation branding as a "strategic tool for enhancing a nation's

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[17] N Kaneva, 'Simulation Nations: Nation Brands and Baudrillard's Theory of Media', *European Journal of Cultural Studies*, vol. 21, no. 5, 2018, pp. 631–648.
[18] Kaneva, 'Nation Branding', *Communication*, 117-141.

competitive advantage in a global marketplace".[19] In this understanding of the practice, national identity is conceived of as a state asset, or a liability, that can be managed, exploited, shaped, or reshaped in order to meet strategic objectives of the state.[20] Among the most prominent voices in this category are Anholt and Olins, both of whom are nation branding professionals who have contributed a significant body of work to the nation branding literature. A theory that frequently emerges from technical-economic works is the claim that all nations have a brand, whether or not they have been 'branded.'[21] The effect of this claim is to establish the idea of a 'brand' as an intrinsic and natural part of the state, or of the national identity. This, in turn, legitimises the place of the branding professional as an actor as a logical and indispensable tool within the arsenal of any state seeking to improve its competitive standing within the international marketplace.

The most robust critique levelled at this category of nation branding literature is the inherent conflict of interest that arises from works that propound the many alleged benefits and transformative potential of nation branding, particularly for under-developed or transitional states, while at the same being written by those who stand to profit financially from the more widespread uptake of the practice. However, due to the influence that these works have had in establishing nation branding as a professional practice and a subject of academic inquiry, it would be negligent not to acknowledge the works of the more significant practitioners in the field as foundational within the nation branding canon.

The second category proposed by Kaneva are the so-called 'political approaches' that form 35% of the nation branding literature examined in this study, the second most frequent approach.[22] Studies adopting the political approach were most likely to be academic works from the fields of international relations, public relations and communications, or works from think tanks or research institutes dealing with fields related to these disciplines. Works in this genre are predominantly concerned with the concept of 'public diplomacy' and its intersection with, or divergence from, the practice of nation branding. Kaneva provides an overview of the various approaches to this issue, stating that most work would situate these two concepts as related yet

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[19] Ibid, p. 120.
[20] Ibid, p. 122.
[21] J O'Shaughnessy & N O'Shaughnessy, 'Treating the Nation as a Brand: Some Neglected Issues', *Journal of Macromarketing*, vol. 20, no. , 2000, pp. 56-64.
[22] Kaneva, 'Nation Branding', *Communication*, 124.

distinct, which a smaller "more controversial" body of literature asserts that they are, in fact, the same.[23] She concludes that there is currently "no clear consensus on the relationship between public diplomacy and nation branding."

The least frequently encountered approach to nation branding research is the 'cultural approach.' This draws primarily from the fields of media and cultural studies and focuses on the democratic and identity dimensions of nation branding. Work undertaken in this frame is often critical of the democratic shortcomings of nation branding practices, notably with its lack of public consultation and its reliance on foreign professionals with what is perceived as being a superficial understanding of national culture and identity. Studies employing a cultural approach also critique the representation, or lack thereof, of minorities within nation branding strategies. As proposed by Anholt, the most effective nation brands are those that propose a clear and uniform vision of the nation being branded. Those who work within the cultural approach often assert that this uniformity comes at the expense of including minorities within the branding discourse.

This is certainly the focus of Sue Jansen's work in her 2008 study of the historical dimensions of Estonia's nation branding strategy, the most comprehensive to date.[24] In this paper, Jansen examines the historical factors that facilitated Estonia's early adoption of nation branding among its post-Soviet peers, the cornerstone concepts and design elements that were selected for incorporation into the strategy, and the elements of contemporary Estonian identity and social reality that were excluded. This includes, most glaringly, the lack of acknowledgement of Estonia's demographically significant Russian minority and its ongoing effect on Estonian public discourse. Jansen draws out several core messages from the Estonian nation branding strategy (as it stood in 2008), among which the idea of Estonia as being 'Nordic with a twist' is highlighted as an example of an aspiration piece of identity-shaping with economic and political goals in mind. However, Jansen stops here and opts not to investigate the significance of this Nordic brand direction in terms of why it has been selected for inclusion. She instead chooses to maintain a line of inquiry that closely conforms to Kaneva's 'cultural approach,' examining the role of private-sector actors in shaping and disseminating the brand

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[23] Ibid, 124.

[24] S Jansen, 'Designer Nations: Neo-liberal Nation Branding – Brand Estonia', *Social Identities*, vol. 14, no. 1, 2008, pp. 121-142.

and the democratic shortcomings that arise from the relationship between these actors and the state.[25]

Kaneva suggests that most works within the field of nation branding research can be associated primarily with one of these classifications, however it is common, or even usual, for studies to "raise questions pertinent to more than one of the three categories".[26] She acknowledges that these classifications should be treated "as a heuristic, rather than as a strict classification," and in this sense it proves a useful tool in situating this thesis within what is an extensive, and growing, body of literature. This thesis will align most closely with Kaneva's first approach - the technical-economic approach - as it takes as its starting point the understanding that nation branding functions as a "strategic tool for enhancing a nation's competitive advantage in a global marketplace".[27] As this approach is characterised by a detailed examination of the mechanics of individual nation branding strategies and the choices made in constructing and applying these brands, it appears consistent with the methods and objectives of this thesis. However, it will also seek to address some questions that may be more consistent with a cultural approach, particularly in its treatment of the concept of 'Balticness' as an identity shared between the nations surrounding the Baltic Sea. In order to properly assess the role of this concept within the context of nation branding it is first necessary to understand the concept itself and identify its competitive dimensions.

Kaneva also outlines the limitations of the existing body of nation branding research, and she identifies the tendency for studies to focus on nation branding as a discourse within a single country as a significant limitation on the ability of this research to deepen our understanding within this field. She states that "combin[ing] data from multiple sites [may] produce richer insights."[28] This thesis seeks to pick up on Kaneva's suggestions for broadening the scope of nation branding literature by synthesising the nation branding discourses of two separate countries within close geographic proximity of one another in order to examine the effects of a common regional identity on individual states' nation branding strategies. Existing studies on nation branding in the Baltic region have taken an approach that is consistent with Kaneva's

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[25] Ibid, 128-130.
[26] N Kaneva, 'Nation Branding: Toward an Agenda for Critical Research, *International Journal of Communication*, vol. 5, 2011, p. 120.
[27] Ibid.
[28] Ibid, p. 128.

'single country' model,[29] and in cases where a broader number of national cases have been examined, these have been presented as discrete cases with limited synthesis between the selected examples.[30]

A small body of literature exists on the individual Baltic states' attempts to brand themselves post-1991, with Estonia enjoying greater academic attention than Latvia in this space. Jansen's work on nation branding as the application of neoliberal 'market fundamentalism' to the articulation of national identity elaborates its main arguments through the use of Estonia as an example.[31] She firstly identifies globalisation as a 'master narrative' into which individual states must insert their own narratives (described by Jansen as 'micro-myths) in order to make their goals and objectives visible in an international forum. These narratives, and their iteration within the globalised master narrative are, in effect, what we think of as nation brands. However, the micro-myths that form the foundation of nation brands inevitably take as their starting point established characteristics of a national identity, a national culture, and a national mythology. The difference in the case of a nation brand, however, is that these established traits must be reinterpreted, repackaged and disseminated in a way that maximises their competitiveness 'in market terms.'[32] Jansen asserts that this occurs in line with a 'reductive logic,' taking the multichannel, multilayered, diffuse national identity of the country and reducing it to only its most marketable elements. The choice of which elements are most appropriate for inclusion are determined by what Cronin calls 'calculative spaces,' or the spaces that have shifted from publicly determined and mutually constructed, to those which are 'commercially constructed' with market forces as their defining driver.[33] Jansen connects this phenomenon to the shift in the late 1980s and 1990s away from branding as a product-based exercise and towards the 'postmodern branding' that we see today. In this phase, the brand is regarded as holding value in

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[29] D Dzenovska, 'Remaking the Nation of Latvia: Anthropological Perspectives on Nation Branding,' Place Branding, vol. 1, 2005, pp. 173-186; D Dzenovska, 'Neoliberal Imaginations, Subject Formation and Other National Things in Latvia, the Land that Sings,' in T Darieva & W Kaschuba (eds), *Representations on the Margins of Europe: Politics and Identities in the Baltic and South Caucasian States*, Campus Verlag, Frankfurt, 2007, pp. 114-138; Jansen, 'Designer Nations,' *Social Identities*, 121-142.

[30] NJ Cull, 'Histories of Public Diplomacy and Nation Branding in the Nordic and Baltic Countries: Representing the Periphery', *Place Brand Public Diplomacy*, vol. 12, 2016, pp. 232–235.

[31] Jansen, 'Designer Nations,' *Social Identities*, 121.

[32] Ibid, p. 122.

[33] AM Cronin, 'Calculative Spaces: Cities, Market Relations and the Commercial Vitalism of the Outdoor Advertising Industry', *Environment and Planning A*, vol. 40,no. 11, 2008, pp. 2734-2750.

and of itself and exists largely independently of any product that it may happen to be applied to. To give an example of this postmodern approach to branding from the corporate sector (example my own), in February 2020 the fried chicken chain restaurant KFC and shoe manufacturer Crocs launched co-branded clogs covered in a print of fried chicken and finished to resemble KFC's distinctive red and white bucket. They even bore the scent of fried chicken. What, we might ask ourselves, is the logic of such a partnership? The answer is that, on a superficial level, there is no reason that fried chicken and clogs should be adjacent to one another yet, when situated within the postmodern brand framework, we are not talking about fried chicken and clogs at all, but a semiotic system that seeks to capitalise on the 'commodity fetishism' that signifies late-stage capitalism.[34] These brands are no longer an expression of the product that they were established to represent and are now free to be applied to any manner of consumable objects. Therefore, it would be incorrect of us to think of the KFC/Crocs collaboration as a marriage of fried chicken and footwear; we should instead think of it merely as the marriage of two sets of semiotic systems in a calculative public space.

To tie this brief history of corporate sector marketing practices back to the field of nation branding, Jansen asserts that, in the contemporary nation branding landscape, there is in fact no difference between American Express, Coca Cola, and Estonia, as all three of these entities have embraced a neoliberal, market fundamentalist approach to identity-shaping.[35] She correctly identifies the Nordic direction of Estonia's nation branding strategy, highlighting the extensive use of such slogans as 'a Nordic country with a twist' and 'the new Scandinavia' as examples of Estonia's economic and geopolitical aspirations. However, she does not further analyse the significance of this choice, instead opting to examine in greater depth what she perceives as the democratic shortcoming of adopting a market-based approach to national identity construction. This thesis will pick up at this point in Jansen's work and instead apply Kaneva's technical-economic approach in order to further elaborate the significance of a Nordic orientation to Estonia's nation branding strategy.

Lagerspetz also isolates Estonia's Nordic aspirations as an important element of its post-Soviet branding efforts, stating that "Estonian foreign policy-makers in particular have made several attempts to change the public image of their country by re-defining it as part of the

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[34] Jansen, 'Designer Nations,' *Social Identities*, 126-127.
[35] Ibid, 126.

Nordic, rather than the Baltic, region."[36] In his article he characterises 'geopolitical identities as constructions and as resources,' acknowledging their commodification and exploitation within nation branding projects. Interestingly, Lagerspetz traces the origins of the Nordic-Baltic divergence to the outcome of the Second World War, stating that previous overtures towards the establishment of intergovernmental structures encompassing those states we now regard as Nordic *and* the three Baltics states including the 1918 proposal by Jaan Tõnisson for the establishment of a 'Balto-Scandian federal state'.[37] However this deeper regional integration was disrupted by the annexation of Estonia, Latvia and Lithuania by the Soviet Union, rendering them virtually entirely incapable of pursuing any further co-operation with the Nordic states. Lagerspetz notes that, prior to the 1940 annexation of the Baltic states, Estonia had showed particular interest among the Baltic states in pursuing deeper co-operation with Scandinavia. Its annexation severed many of these ties, and the establishment of Nordic institutions such as the Nordic Council in 1952 further entrenched the Nordic geopolitical identity as a construct exclusionary of the Baltic states.[38] Is seeking to apply a more empirical approach to the Baltic states' alignments to a Nordic identity, Lagerspetz proposes eight markers of Nordic identity and assesses the three Baltic states against them. The results are as follows:

[36] Lagerspetz, 'Nordic Countries', *Cooperation and Conflict*, 49–61.
[37] Ibid, p. 51.
[38] Ibid.

TABLE 1
The Nordic Identity is Based on . . .

	Estonia	Latvia	Lithuania
1. Geographical location	×	×	(×)
2. Historical ties	×	×	—
3. Linguistic affinity	(×)	—	—
4. Lutheran faith	×	(×)	—
5. Social development (the Nordic model)	—	—	—
6. Nordic cooperative organs	(×)	(×)	(×)
7. Legal and administrative tradition (municipal self-determination; the rule of law)	(×)	(×)	?
8. Gender equality	—	—	—

Note: The obvious or relative presence of an element of Nordic identity is indicated by '×' and '(×)' respectively. The sign '—' stands for the absence of an element. The question of the relationship is left open, which is shown by '?'.

Figure I: Markers of Nordic Identity in Estonia, Latvia, and Lithuania. Source: M Lagerspetz, 'How Many Nordic Countries?[39]

As we can observe from this table, according to Lagerspetz Estonia and Latvia demonstrate a comparable level of 'Nordicness,' with Estonia receiving a score of three for 'obvious' presence of a Nordic identity and three for a 'relative' presence of a Nordic identity. Latvia scores two in the former category and three in the latter. By contrast, Lithuania exhibits few elements of a Nordic identity, with a score of two for 'relative' presence and one category that is undetermined. Not only does this data go some way to justifying the exclusion of Lithuania from this thesis as it weakens the case for Lithuania to brand itself in a Nordic direction as such a move would lack credibility, but it also challenges the idea of a common and consistent identity throughout the Baltic states. However, while his introduction alludes to the nation brands that emerged as elaborations of these respective identities, Lagerspetz does not shift his focus away from broad conceptions of Nordicness to explore how these identities are iterated through nation branding channels. This thesis will attempt to take Lagerspetz's conceptualisation of the boundaries of Nordicness and its interaction with a Baltic identity and

[39] Ibid.

transpose it into the field of nation branding in order to identify the ways in which these respective identities are perceived as being competitive or uncompetitive in a neoliberal marketplace of branded nations.

As mentioned previously, the existing canon of nation branding literature exhibits a strong tendency towards single-country analysis, as opposed to synthesising multiple country-level examples in order to draw conclusions around commonalities and differences across case studies. Among the few who have attempted this approach are Bolin and Ståhlberg who, in their 2016 paper sought to examine shifts in how nationalist discourse is constructed through nation branding strategies with relation to its interaction with temporality through a comparative analysis of the Estonian and Indian experiences of nation branding.[40] The paper provides a very comprehensive overview of both examples, highlighting the broad historical factors (collapse of the Soviet Union, the end of British colonial rule in India) that informed the way these countries have branded themselves.

However, the authors do not manage to satisfactorily clarify their methodology for selecting Estonia and India for comparison, nor do they explain why these two states make logical or appropriate candidates for analysis in terms of the dual themes of nationalist discourse and temporality. Furthermore, despite claiming that this study would focus on a comparison between Estonia and India, these two examples are treated discretely from one another. The conclusions presented in the paper which, from the outset, are stated by the authors to address their three arguments, do not touch on any of these arguments and instead reiterate broad claims about the democratic shortcomings of nation branding in terms of its engagement with citizens. This thesis will incorporate the historical dimensions of Estonia and Latvia's nation branding strategies insofar as this is necessary to examine comparative changes in these strategies over time, but it will also seek to move beyond this in order to conduct a thorough comparative analysis of the mechanics of these strategies as they relate to Baltic identity.

[40] P Ståhlberg & G Bolin, 'Between Community and Commodity : Nationalism and Nation Branding' in A Roosvall & I Salovaara-Moring (eds.), *Communicating the Nation : National Topographies of Global Media Landscapes,* Nordicom, Göteborg, 2010, pp. 79–101.

2.2 Nation Branding in Central & Eastern Europe - The Context of System Transformation

In order to fully account for the historical and cultural specificities of the Estonian and Latvian nation branding strategies, we must first acknowledge that branding a country in transition presents unique challenges and opportunities, and is often undertaken with an entirely different set of objectives in mind, that the branding strategies that are formulated for post-industrial countries. Szondi proposes a theoretical framework of six potentially intersecting and coexistable objectives that may inform the choices made by transitional countries in branding themselves during the period of transition. These include: breaking from an 'old order,' particularly in the case of post-Soviet states; to dissipate negative or harmful stereotypes or perceptions that may be attached to the state from its pre-transition period; to "position the country as the reliable and eligible member of the new system"; to support the repositioning of a 'peripheral' country towards the 'centre,' and to gain the support of those countries that constitute the centre; to "facilitate (re-)defining and (re-)constructing national identities" at a time when such identities may be in a state of instability and change; and to assert self-esteem and self-confidence over a country's new direction.[41] This framework is highly useful in the case of Estonia and Latvia as it provides a logical theoretical starting point for analysing the rationale behind the choices that were made in constructing nation brands in each of these cases. This is particularly useful in establishing an analytical connection to the research question of this paper, which seeks to address not only the mechanics of each of these strategies, but also the rationale behind the choices in so far as they relate to the competitiveness of incorporating a regional identity into a national branding strategy. Szondi does, in fact, deal with the challenges faced by transitional countries undertaking a nation branding project in terms of engagement with a regional identity as an aside to his brief description of the choices made by the republics of the former Yugoslavia following the breakup of the latter in the early 1990s. In this short description he assesses that an important element of the post-Yugoslav branding of these newly independent states was the perceived necessity of communicating a 'non-Balkan identity' as a means of

[41] G Szondi, 'The Role and Challenges of Country Branding in Transition Countries: The Central and Eastern European Experience', *Place Branding and Public Diplomacy*, vol. 3, no. 1, 2006, pp. 10-11.

'disassociating themselves' from Balkan-ness.[42] However, Szondi does not interrogate this trend any further with regards to the motives that produced such an outcome, and does not attempt to explain why a Balkan identity was perceived by these transitional states as being an undesirable or uncompetitive platform for a post-Yugoslav nation brand. I propose using Szondi's core idea that transitional states will seek to use nation branding as a platform to disassociate from a pre-transition regional identity as a starting point for an examination of the factors that may has contributed to an adherence to this trend in the Estonian case, but a divergence from it in the case of Latvia.

[42] Ibid, p. 10.

Chapter III:
Selected Practices of Nation Branding in the Post-Soviet Space

3.1 Nation Branding in the Post-Soviet Space

The idea of attempting to shape the way one's community is perceived outside its borders is not a new phenomenon. This practice, in its most essential form, has existed for centuries, with some tracing its origins as far back as 2500–1700 BCE when products originating in the Harappan civilisation were branded with animal seals for international trade as a symbol of quality and provenance.[43] Olins suggests that even the changes of regime in France over time, from kingdom to republic to empire and back again, and the subsequent attempts to reimagine France in line with these changes can be thought of as a form of nation branding.[44] However it was not until the late-20th century that nation branding as a formalised discipline emerged, with a codified set of rules and professional practices largely appropriated from the corporate sector.[45] This period was also a time of immense political and social upheaval, particularly in Central and Eastern Europe. Prior to 1991, the Soviet Republics were branded according to a monolithic national identity disseminated by Moscow, with extremely limited scope for differentiation when marketing themselves abroad. As stated by Wojnowski, 'Soviet leaders in Moscow aimed to undermine regional, religious, and clan identities and, more broadly, to create what they defined as modern societies in the non-Russian regions of the USSR.'[46] By privileging the dissemination

[43] C Viktorin, J Gienow-Hecht, A Estner & M Will (eds.), *Nation Branding in Modern History*, Berghahn Books, Oxford, 2018, p. 3.
[44] W Olins, 'Branding The Nation: The Historical Context', in Morgan, N, Pritchard, A, and Pride, R (eds.) *Destination Branding: Creating the Unique Destination Proposition*, Elsevier Butterworth-Heinemann, Massachusetts, 2002, pp 18-21.
[45] Ståhlberg & Bolin, 'Between Community and Commodity', *Communicating the Nation,* 79–80.
[46] Z Wojnowski, 'The Soviet People: National And Supranational Identities In The USSR After 1945', *Nationalities Papers*, vol. 43, no.1, 2015, pp. 1-7.

of a single, Soviet identity, Moscow left little scope for the Soviet Republics to differentiate themselves externally.

The domino-like fall of communism across this region beginning in 1989 and culminating in the collapse of the Soviet Union in 1991 resulted in the emergence of a tranche of newly independent states in Central and Eastern Europe, North Asia and the Caucasus. Long hidden to the world behind the veil of Soviet statehood, these countries (re)gained their independence a time when the traditional signifiers of competitiveness such as natural resources, military might, and population size were being de-emphasised in favour of 'softer' qualities such as economic potential, quality of education, and technological prowess.[47]

A major upheaval in the socio-political landscape of a state can often be the catalyst for that state to pay greater attention to how it is perceived abroad, provided these shifts open the state to a period of relative stability, greater democracy and stronger institutions.[48] It is significant, then, that just such a change occurred in Estonia and Latvia at a time when many states around the world were beginning to engage in the nascent practice of branding themselves. As Ståhlberg and Bolin note, 'nation branding is a historically specific phenomenon connected to ideological and economic changes on a global scale in the later decades of the twentieth century.'[49] These decades coincided with the emergence of the new, post-Soviet states, many of whom were seeking to make a swift entry into Western markets and accede to Euro-Atlantic institutions such as the European Union and NATO. This confluence of factors created what we may consider a 'critical juncture' in the path of many of these states in establishing their own competitive identities and generating strategies to brand themselves internationally.

It is important at this point to assert the distinction between a nation brand and nation branding, as these two related yet nonsynonymous concepts have proven challenging for some post-Soviet states to reconcile. As Anholt and Dinnie have observed, every country has a brand, yet not all countries have been branded.[50] In effect, this means that no nation branding strategy begins with an entirely blank slate and that all attempts at implementing coordinated strategies

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[47] G Simons, 'Attempting To Re-brand The Branded: Russia's International Image In The 21st Century', *Russian Journal of Communication*, vol. 4, nos. 3/4, 2011, p. 326.
[48] P Ståhlberg & C Bolin, 'Having A Soul Or Choosing A Face? Nation Branding, Identity And Cosmopolitan Imagination', *Social Identities*, vol. 22, no. 3, 2016, pp. 274-290,
[49] Ibid, p. 275.
[50] Dinnie, *Nation Branding,* 14-15; S Anholt, *Brand New Justice*, 15.

must consider any pre-existing brand that has coagulated around a state, whether by design or through the effects of broader sociocultural or historical forces. Marat, referring to the post-Soviet states of Central Asia, refers to the latter as 'passive brands,' many of which were formed from Soviet-era perceptions of poverty, crumbling infrastructure, and corruption compounded by post-Soviet events such as revolutions.[51] None of these qualities were purposefully applied to the states in question, however they have left an enduring mark on how these countries are perceived, collectively and as a bloc, outside of the region. These 'passive brands' vary in their strength, with some such as Uzbekistan holding a comparatively strong brand while others, such as Kyrgyzstan, have a relatively weak brand in the international marketplace.[52] However, to say that a brand is strong is not to say that it is positive, and this is where many post-Soviet states suffer. While a revolution or extremely high levels of corruption in a country can result in a very strong brand image, the resulting brand is likely to be perceived very poorly by tourists, investors, and other national governments. The question that arises for those post-communist states undertaking a nation branding initiative is whether or not elements of these passive brands are salvageable and are able to form the basis for a post-independence competitive identity.

According to Ståhlberg and Bolin, certain preconditions are required for a state to be liable to adopting a nation branding strategy, and these include the presence of 'neoliberal politics favouring a weak state and strong markets.'[53] In the case of both Estonia and Latvia, 'free market radicalism' was the chosen path towards economic and fiscal independence from a sovietised economy and the troubled ruble area.[54] These economic conditions are more likely to produce an environment in which the state is characterised as a marketable consumer good and the legitimate subject of branding forces in order to enhance its competitiveness in the global marketplace.

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[51] E Marat, 'Nation Branding in Central Asia: A New Campaign to Present Ideas about the State and the Nation', *Europe-Asia Studies*, vol. 61, no. 7, 2009, pp. 1124–1128.

[52] In the 2019 Brands Finance Nation Brands Index, which rates the value of nation brands globally, Uzbekistan appears at number 77; by contrast, Kyrgyzstan does not appear within the top 100, despite neither country having attempted an active branding strategy; Brands Finance (2019), *Nation Brands 2019*, London, <https://brandirectory.com/rankings/nation-brands>.

[53] Ståhlberg & Bolin, 'Having A Soul', *Social Identities*, 275.

[54] A Åslund & V Dombrovskis, 'Latvia's Post-Soviet Transition', *How Latvia Came Through The Financial Crisis*, Peterson Institute for International Economics, Washington, DC, 2011, p. 8.

3.2 Building a Nation Brand for Estonia

Estonia is considered an early adopter of neoliberal nation branding practices, embracing this practice with almost textbook diligence less than ten years after the country had regained its independence. In 2000, Estonia's Ministry of Economic Affairs commissioned the establishment of Brand Estonia, itself an agency within the broader portfolio of Enterprise Estonia, with the key objective of promoting the economic potential of Estonia abroad.

Alongside this movement towards establishing Brand Estonia in the international imaginary, a discursive shift was taking place at a political level. While Estonia had long been — and, in certain contexts, still is — considered to be Eastern Europe by virtue of its status as a nation belonging the former Eastern Bloc, the belief was held at all levels of society that this was not truly reflective of Estonia's socio-cultural, or even geographic, standing. On 14 December 1999, the then Foreign Minister of Estonia Toomas Hendrik Ilves gave a speech to the Swedish Institute for International Affairs entitled *Estonia as a Nordic Country*.[55] In this speech, Ilves makes the case for critically revisiting and, ultimately, dismantling our understanding of the 'Baltic states' as a cohesive and socio-political unit. Using a rhetorical device that seeks to realign Estonia with the 'Nordic' countries (in this case Denmark, Finland, Norway and Sweden), he asks the audience to envisage a grouping of states called 'Yule-land.'

After briefly mentioning a shared Christian heritage, Ilves states that:

> *Jõul* in Estonian, *Joulu* in Finland, *Jul* in Sweden, Norway, Denmark and *Jol* in Iceland. On the British Isles, *Yule*. At Yule-tide, Jultid, Jõuluaeg, we burn the Yule-log, a symbol of warmth and light at the darkest and coldest of times. The Yule-swath that extends from Iceland and Britain through the Scandinavians to the Finnic lands that include Estonia, ends there. In Latvia Yule is *Ziemastvetki*, in Lithuania *Kaledos*, in Russia *Rozhdestvo*.[56]

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[55] TH Ilves, *Estonia as a Nordic Country*, Swedish Institute for International Affairs, Stockholm, 14 December 1999, <https://vm.ee/en/news/estonia-nordic-country>, viewed 5 November 2018

[56] Ibid.

Ilves goes on to refer to a range of other indicators as varied as archaeological discoveries, corruption indices, and technological advancement in order to build a case that Estonia is, in fact, a constituent of this Northern agglomeration. However, he is careful not to frame this as a stagnant position; rather, he states that "something is on the move." He asserts that Estonia's inherent Nordic-ness played an integral role in breaking down the reluctance on the part of the European Union to allow accession for post-Soviet states. Ilves also builds a case for the dismantling of the idea of a Baltic identity by stating that, rather than being founded on common linguistic, cultural, or ethnic bonds, it "merely derives from shared unhappy experiences imposed upon [the Baltic peoples] from outside: occupations, deportations, annexation, sovietization, collectivization, russification. What these countries do not share is a common identity." This idea of the 'Baltic' label, as applied to Estonia, Latvia and Lithuania, as being the manifestation of a common history of tumultuous upheaval and the suppression of national identity, as reflected in Ilves' statements, goes some way to explaining why those entrusted with branding these states may go to lengths to distance themselves from 'Balticness' as an identity marker.

As Ilves implies in his speech, the 'Baltic' label was, at the time, deeply embedded with a tranche of post-Soviet connotations such as a high perception of corruption, a biased and ineffective judiciary, and a certain backwardness with regards to technological capacity.[57] However, while Ilves frequently uses the term 'Baltic' or 'Baltic states,' he does so in a way that seeks to problematise the received meaning of the term, particularly over time. At its core, Ilves' argument seeks to disrupt the prevailing mental geography as it stood at the time the speech was made. It is perhaps no wonder, then, that in seeking to establish a strong and competitive nation brand, those responsible for this task was a path-of-least-resistance in aligning the Estonian brand more closely with a regional identity that was already associated with high levels of confidence in the global marketplace, the Nordic identity, rather than assume the far greater task of rehabilitating the Baltic identity at an historical moment when Latvia and Lithuania were seen by the existing members of the European Union and NATO as not meeting their targets for accession to those institutions. However Götz suggests that this negative association of Balticness with invasion, subjugation and oppression does not begin with the events that marked

[57] Ibid.

the region's 20th century history, but can in fact be traced back further, deriving its "aura of oligarchic regionalism [from] the former German ruling class of what today are Estonia and Latvia."[58]

To critically assess the pathway that Estonia has taken in terms of its perception abroad, it is useful to examine the case of Finland as a counterfactual. Estonia has long enjoyed a special relationship with Finland. There are strong linguistic, ethnic, and cultural ties between the two countries; the first port of call for a newly elected Estonian president is typically Helsinki, and many Estonian workers have, in the past, sought work in Finland. However, it is precisely these commonalities with Estonia that historically set Finland apart from its Scandinavian neighbours. Throughout the nineteenth century, the concepts of 'Nordic', 'Baltic', and 'northern' had not yet fully crystallised in the way that we understand them today. While the physical geography of Finland is certainly 'northern,' extending, as it does, well into the Arctic Circle, the mental geography of Finland was more ambiguous. In many cases it was imagined as being a Baltic state, along with the likes of Estonia, Latvia, Lithuania and even Poland.[59] However these latter four countries faced a divergent historical trajectory to Finland when they were brought under the Soviet sphere of influence, while Finland remained independent. Prior to its annexation, both Estonia and Finland had shown a strong interest in greater cooperation with the Scandinavian countries. However, as Estonia had no control over its foreign policy while under Soviet control, it had no way of pursuing these aspirations. Finland, on the other hand, seized the opportunity for greater integration into the Nordic region and, in 1955, joined the Nordic Council which had been established three years prior.[60]

This is the period in which huge strides were made in Nordic integration, including the removal of tariffs on trade within the bloc, freedom of movement of workers, and standardisation of social security systems.[61] By the time the Baltic states regained their independence in 1991, the mental geography of the region has shifted and crystallised, with Finland firmly in the Nordic camp and Estonia now part of 'Eastern Europe,' the label applied to all those states that had been part of the now-defunct Soviet Union. That is all to say that the broad geopolitical shifts gave

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[58] Götz, 'Collective Identities', *The Sea of Identities,* 14.
[59] Lagerspetz, 'Nordic Countries', *Cooperation and Conflict*, 51.
[60] Ibid.
[61] International Peace Institute, 'The Case of the Nordic Councils', *Mapping Multilateralism In Transition,* vol. 1, December 2013, p. 3.

Finland the opportunity to achieve what Götz describes as a 'reframing' of its regional identity, although the term 'rebranding' may be equally pertinent in this case.[62] In doing so, Finland demonstrated that it is entirely possible to break away from a prevailing regional identity and assume another. Of course, Finland's methodology for doing so did not borrow from the repertoire of nation branding (this field of professional practice or academic inquiry not having been established as such at the time), however it's trajectory did share a significant commonality with Estonia: both used a critical historical juncture, and the ensuing uncertainty, to reframe the way they interacted with competing regional identities in the international imaginary.

For Estonia and Latvia, the primary critical juncture took the form of the collapse of the Soviet Union, allowing both these countries the freedom and flexibility to establish new and independent identities, and to disseminate them via the medium of nation branding. However a series of sub-junctures, or waypoints on the path to establishing their nation brands that prompted a rapid crystallisation of strategies that had, until that point, lacked a platform for widespread dissemination. Coincidentally, both Estonia and Latvia were afforded just such a platform when they won the Eurovision Song Contest in consecutive years in the early 2000s (Estonia in 2001; Latvia in 2002) giving them the opportunity to host the contest the following year and exposing these relatively unknown states to a global audience reaching into the hundreds of millions from across Europe and, indeed, from around the world. Such opportunities are decidedly rare within the scope of nation branding, as they present an opportunity for a country to elaborate its brand in a format that can reach recipients whom they may never be able to engage otherwise. Other platforms of this type, such as the Olympic Games or the FIFA World Cup, are unattainable for small states such as Estonia and Latvia, and so the Eurovision Song Contest provided a relatively accessible entry point to nation branding for these states via the medium of a highly visible global cultural event, but without the prohibitive financial outlay that this may otherwise have entailed.[63]

Estonia's attempts at developing the first iteration of its nation brand was already underway when it won the Eurovision Song Contest in front of a record crowd of nearly 35,000

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[62] Götz, 'Collective Identities', *The Sea of Identities,* 14.

[63] It is worth noting that Estonia has, in fact, been the venue for an Olympic Games in the past. Tallinn hosted the sailing programme of the 1980 Moscow Olympics at the Olympic Yachting Centre in the northern suburb of Pirita. As Estonia was under Soviet occupation at the time, however, this is not a useful subject for analysis through the lens of nation branding of an independent Estonian state.

at the Parken Stadium in Copenhagen in 2001.[64] While Estonia's winning entry *Everybody*, by Tanel Padar and Dave Benton, did not achieve widespread popular success, its victory guaranteed Estonia the right to host the 2002 contest. The relatively tight timeframe for organising the contest also put pressure on those responsible for developing Estonia's nation brand to expedite the process, ensuring it would be ready to launch prior to the contest. As Jordan notes, nation branding is a means by which a country tells the world what it is and, crucially, what it is not.[65] Estonia capitalised on this opportunity to perform a process of introduction, launching its brand into the global marketplace with the clear objective of establishing a broad public perception of Estonia as a modern, stable, open, and democratic European nation, and certainly *not* a corrupt, regressive, and insular post-communist state, as were common perceptions of former Soviet republics at the time.

However, Estonia did not just seek to enter 'Europe' with this branding strategy; they sought to enter 'Northern Europe' as a newly independent Nordic nation. This strategy is outlined in the brand handbook, produced by Brand Estonia in 2001 to coordinate the voice of Estonia's nation branding effort as it entered an important phase. This document, entitled *Eesti Stiil* (Estonian Style) dictated the direction of the branding strategy, as well as key objectives that the project was hoping to achieve. It contains both textual and visual guidelines for Estonia's nation brand, as well as extensive explanations for the rationale behind why these elements were selected and how they serve to enhance the competitiveness of Brand Estonia. The document is also the source of one of the slogans that would be attached to much of Estonia's nation branding material over the course of this campaign: 'Estonia: Nordic with a Twist.'

To gain a broad overview of the general themes that emerge from this document, Krippendorf and Bock suggest an impressionistic content analysis, taking the form of a word

cloud, may offer some insight into the possible interpretations of the text if we take as our starting point the assumption that meaningful information can be gained solely from word frequency.[66]

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[64] European Broadcasting Union, 'Copenhagen 2001', *Eurovision.tv,* <https://eurovision.tv/event/copenhagen-2001>, viewed 25 April 2020.
[65] P Jordan, 'Nation Branding: A Tool for Nationalism?', *Journal of Baltic Studies*, vol. 45, no. 3, 2014, p. 284.
[66] K Krippendorf & M Bock, *The Content Analysis Reader*, SAGE, New York, New York, 2009, p. 38.

Figure II: Twenty-five most frequently used terms in the *Eesti Stiil document*. Generated at https://tagcrowd.com; accessed 20 April 2020.

This word cloud was created by converting the *Eesti Stiil* document into a simple text form, which removed text formatting and images. This raw text was then analysed to identify the 25 most frequently recurring words. These words were then scaled according to their frequency and grouped according to theme and similarity (for example, 'Europe' and 'European' were grouped adjacent to one another), with the most frequently occurring word appearing in the largest font size and the darkest colour. The total frequency of each word appears to the right of the word. If we take simple word frequency as a meaningful indicator of the importance of various concepts within the document, a visual representation of textual data such as that above shows several significant trends.

Firstly, the most frequently used words are entirely consistent with what we would expect with a document of this type and, indeed, operate on the most superficial level of meaning. 'Brand', 'Estonia/ Estonian', and 'country', tell us little beyond the fact this is a strategy to brand a country called Estonia, However, the next tier or key words begins to reveal more specific and thematically oriented aspects of the strategy that may offer some indication of the brand direction. 'People', 'transforming' and 'positive' may indicate that we are looking at a brand that is seeking to align more strongly with one particular sector of Anholt's hexagon of competitive identity (that is, the 'people' sector) and that the messaging should be broadly positive or that positivity will be a key theme in the strategy. However, for our purposes it is most significant to

examine one frequently occurring word in relation to one word that does not occur at all. 'Nordic' occurs 23 times in the portfolio, even more frequently than more generic terms such as 'national' or 'business'. By contrast, the word 'Baltic' does not appear in the top 100 words within the document, meaning that it appears fewer than 10 times. By this measure, we may make the assumption that, in formulating a brand strategy for Estonia, those responsible found 'Nordicness' to be a more important, or perhaps more marketable, concept than 'Balticness'.

However impressionistic representations such as this offer only very limited critical insight into the mechanics of a brand strategy as the more meanings of many of these terms are highly variable according to the context in which they are used. In order to achieve a more granular understanding of how these themes are operationalised, it is necessary to conduct a more critical content analysis, taking into account context and usage in order to build up a more comprehensive impression of how the dual themes of Nordicness and Balticness are connected to competitiveness.

Eesti Stiil is revealing for its candour regarding Estonia's aspirations *vis-a-vis* a Nordic identity, and how 'Nordicness' is perceived by those constructing the Estonian nation brand as being an integral part of a competitive identity. The English language version of this document features the word 'Nordic' 23 times, referring to both Estonia's own identity, its relationship with 'other' Nordic countries, and attributing 'Nordicness' to various visual elements within the nation branding materials produced as part of the strategy.[67] Six mentions of the word Nordic come in the context of reiterations of the campaign slogan 'Nordic with a Twist.' The handbook explains the rationale behind this slogan as an attempt to encapsulate the idea that Estonia is, in its most essential form, in possession of "a Nordic temperament and environment."[68] This includes windswept vistas, snow-covered forests, minimalist cathedrals, and clean streets, in addition to a bevy of blonde citizens.[69] However it also problematises these Nordic qualities, characterising them as "boring and clinical," and offering up Estonian "quirkiness, irony and experimentation" as the antidote.[70]

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[67] The complete document includes an Estonian-language version of the text, followed by an English-language translation, and a bilingual guide to the visual components of the branding strategy. For the sake of this analysis, only the English-language text was examined.

[68] Brand Estonia, *Eesti Stiil*, Brand Estonia, Tallinn, 2001, p. 68.

[69] Ibid.

[70] Ibid, 68.

The 'Nordic with a Twist' tagline is also given as a directive for the photo gallery accompanying the handbook, the first of its kind for an Estonian nation brand. The instruction is given to those who may, at a future date, be in a position to add to the photo gallery: "if you are commissioning new images for the image bank or selecting images to use in communications material please think carefully about what 'Nordic with a twist' means."[71] However, when it comes to addressing the topic of Estonia as actually *being* a Nordic country, the handbook takes a more pragmatic approach. In all, Estonia is stated as actually being a Nordic country on nine occasions, with the document often citing its long history of connectedness with other Nordic countries, its 'similarity' to the Nordic countries, its membership of the 'Nordic socio-geographic region, and its 'Nordic temperament and environment' as the basis for this claim. In the following paragraph a number of contrasting themes emerge:

> Despite an absence of any managed effort in the past, Estonia's brand identity is already reasonably well understood within the Nordic region, yet it is less robust than those of other Nordic nations. It is relatively indistinct among the EU applicant states (even in comparison to some less-well-prepared nations), and is largely unknown or not understood outside Europe and Russia.[72]

Firstly, the agency responsible for producing this document appears to be seeking to both reinforcing its own, natural role as custodian of a nation brand by asserting the importance of a 'managed effort' in establishing a brand identity while drawing on language that seeks to incorporate Estonia into the Nordic region; 'within the Nordic region' and 'other Nordic nations' both assist in incorporating Estonia into a discourse of Nordic belonging.

On the other hand, on a number of occasions the relationship between Estonia and the Nordic identity is problematised and a number of divergences from a straightforward Nordic identity emerge. It is at this point that a critical dichotomy is established in the text, For example, the handbook notes from the outset that Estonia is 'becoming increasingly similar to the Nordic countries,' implying simultaneously that it is not, in fact, a Nordic country but that there is a temporal process of realisation of a Nordic identity that is underway.[73]

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[71] Ibid, 109.
[72] Ibid, 48.
[73] Ibid, 39.

Eesti Stiil indirectly addresses one of the accusations most frequently levelled at nation branding, namely that it is an undemocratic practice that does not adequately take into account endogenous cultural elements within the society being branded. This point is elaborated extensively by Jansen, who reports that the vision for Estonia's nation brand, so well received and widely-adopted by the corporate sector, was quite poorly received by the general public and community organisations who felt that the brand was overly reductive, failing to take into account the diversity within Estonian society.[74] This proved particularly divisive when factoring in the existing, underlying tensions between the ethnic Estonian community in the country, and the Russian-speaking population that had remained post-1991. *Eesti Stiil* does little to dispel these concerns, describing its stakeholder consultation practices as being levelled exclusively at "opinion-leaders… prominent people in Estonia," omitting any mention of broader consultation at a more grassroots level. The findings of these interviews with prominent Estonians are summarised in the document in terms of key themes that emerged from the discussions, many of which bear a similarity to those marketing points incorporated into nation branding strategies across nations in all regions: the 'land of contrasts' trope; a country undergoing positive change; a society characterised by an optimistic and open aspect towards the world.[75] These themes are not unique to Estonia and provide little in terms of analytical insight into the specificities of the Estonian nation branding approach when compared to other nations in the region.

However, the report also noted that, among the "healthy diversity of opinion" displayed by those interviewed, "nearly every interviewee spoke of how limiting and potentially misleading a 'Baltic' regional grouping has been for Estonia, and, in turn, how much more fitting and motivating a worldwide understanding of it as a Nordic country – both temperamentally and geographically – would be."[76] It is immediately apparent from this observation that the discourse of Estonia's engagement with a regional identity is both complex and problematic. Firstly, the discourse of regional identities proposed in *Eesti Stiil* establishes the Nordic and Baltic identities not simply as *competing* identities, but as mutually incompatible identities of unequal value. The perception among respondents, according to the handbook, is that a global consensus on Estonia's situation with regards to these identities may prove to be either a benefit or a detriment

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[74] Jansen, 'Designer Nations,' *Social Identities*, 128-130.
[75] Brand Estonia, *Eesti Stiil*, Brand Estonia, Tallinn, 2001, p. 50.
[76] Ibid, pp. 51-52.

to Estonia's potential to improve its standing within the global marketplace and that, through actively and persuasively addressing the question of regional identity in its nation branding strategy, Estonia may be able to operationalise a Nordic identity for the purpose of competitive advantage while simultaneously distancing itself from an uncompetitive Baltic identity.

This process of the attribution of value to, and commodification of, identity by Brand Estonia is both an adamant pursuit of Anholt's conception of competitive identity, and a distinct departure from it. On the one hand, Anholt stresses the importance of focusing on a few key messages in a nation branding strategy and making these the fundamental qualities of the nation brand that are disseminated to the public. In this sense, foregrounding Estonia's 'Nordicness' while playing down an existing identity component – 'Balticness' – is precisely how Anholt suggests going about refining the messaging of a nation brand.[77]

On the other hand, Anholt is careful to qualify this recommendation with the assertion that this key messaging should be, above all, *believable*. On this matter, *Eesti Still* clarifies that "interviewees were often realistic about the differences between the established Nordic Union and Estonia in terms of relative wealth and development, social-welfare programmes and popular political affiliations."[78] However it raises the question of whether this pragmatism regarding the plausibility of branding Estonia as a Nordic country was factored in when establishing the brand identity. Despite the fact that the document itself states that the Estonian model is markedly different to the Nordic model in several areas, it appears that the decision was made to persist with a Nordic branding trajectory despite potential concerns from stakeholders over its credibility. These concerns are supported by Lagerspetz's codification of Nordic identity characteristics, in which he supports the observations of the *Eesti Stiil* interviewees when he states that "the common social model has been recognized as one of the hall-marks of the Nordic countries, not only by outside observers, but by the people of the five countries themselves."[79] The idea that domestic policy, such as the social security model described here, is one of the six cornerstones of nation branding as proposed by Anholt.

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[77] S Anholt, 'Competitive Identity', in Nigel Morgan, Annette Pritchard, Roger Pride (eds.), *Destination Brands: Managing Place Reputations*, Routledge, London, 2002, pp. 21-32.
[78] Brand Estonia, *Eesti Stiil*, Brand Estonia, Tallinn, 2001, pp. 51-52.
[79] Lagerspetz, 'Nordic Countries', *Cooperation and Conflict*, 55.

Figure III: Anholt's Hexagon of Competitive Identity. Source: S Anholt, *Competitive Identity.* [80]

Lagerspetz notes that, while policy may be an important component in any branding strategy, in the case of a Nordic identity it is elevated to the level of being an essential marker of belonging, and one that, in the case of social security, Estonia does not possess. While the Nordic countries are often characterised as 'welfare states' due to their high levels of public spending and multi-level collective bargaining arrangements, Estonia approached its post-Soviet development through a more neoliberal framework that has continued to define its economic model to this day.[81] Estonia has shown no signs of attempting to shift this domestic social security policy in a more Nordic, welfare state direction in order to bolster the credibility of its international branding efforts.

Aside from these broad, directional statements around the strategy for developing Estonia's nation brand, *Eesti Stiil* also provides guidance and rationale for the more technical aspects of the brand, including various aspects of the visual brand identity. As mentioned previously, a photographic library is a common component in many countries' branding strategies and Estonia is, of course, no different. A small selection of images are shown within the handbook and justified according to their depiction of Brand Estonia's guiding ethos: representing Estonia as "a country with a powerful and charismatic personality: essentially 'Nordic with a twist'."[82]

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[80] S Anholt, *Competitive Identity',* 26.
[81] Lagerspetz, 'Nordic Countries', *Cooperation and Conflict*, 57.
[82] Brand Estonia, *Eesti Stiil*, 94.

The images selected fall into two main categories: those depicting landscapes, and those depicting people. There is occasional overlap between these two categories as a small number show people interacting with a landscape, however there is a strong tendency to focus on either conventional portrait photography or conventional landscape photography. Of the images selected, 11 are portraits and 8 are landscape photography. While the landscapes do not display a strong or distinct sense of place, borrowing stylistically from many other branding libraries of this type, the portraits included in the library give a stronger sense of the type of regional identity that Estonia is seeking to disseminate through these images. As described by Lunde, "within the American cultural imaginary, the Scandinavian has been marked as the blonde-haired, blue-eyed, light-skinned Nordic."[83] While Lunde characterises this as a perception specific to a North American cultural imaginary, due to the proliferation of media from this region throughout the world, it is not unreasonable to assume that this understanding of what a Nordic person does (and does not) look like displays a more global reach in practice. In order to operationalise this racialised understanding of Nordicness within the framework of its nation branding strategy, Brand Estonia has opted to include models that depict the image of Nordic people as Lunde describes it.

Picture I: Sample image from the *Eesti Stiil* image library [84]

Picture II: Sample image from the *Eesti Stiil* image library [85]

[83] A Lunde, *Nordic Exposures: Scandinavian Identities in Classical Hollywood Cinema*, University of Washington Press, Seattle, 2010 p. 3.
[84] Brand Estonia, *Eesti Stiil*, 69.
[85] Ibid, 72.

While it is entirely reasonable to suggest that these images have been selected for inclusion due to the fact that they genuinely represent Estonian people, by pursuing this argument we encounter one of Jansen's primary concerns about the treatment of minorities within nation branding strategies. Estonia's ethnic Russian community currently accounts for approximately 25% of the total population of the country, and yet this group is not mentioned at all within the document. Quite the contrary, the handbook states that "the national desire [is] to continue to move further away from Russia."[86]

An analysis of the usage of the word 'Baltic' across the Estonian and Latvian branding strategies from this period reveals strong differences in the frequency of usage of the word 'Baltic,' and in the ways in which it is assigned meaning within each strategy. Within the Estonian brand handbook, the word 'Baltic' is mentioned only three times. The first of these instances ascribes it with a purely geographical meaning, situating Estonia on the "eastern coast of the Baltic Sea".[87] This purely factual assertion comes in the introduction to the strategy, and does not seek to construct any additional meaning beyond informing the reader of Estonia's location, as is typical in documents of this kind. However both subsequent uses of the word relate to a more cultural or historical understanding of what it means to be 'Baltic,' and it is in these usages that a more critical lens is applied what it means to be 'Baltic' beyond a geographical sense, and through which an examination of the competitiveness of a cultural 'Balticness' is expounded. Both of these uses of 'Baltic' refer to a 'Baltic grouping,' acknowledging the external perception of Estonia as belonging to a regional unit implicitly comprising the three countries positioned along the eastern coast of the Baltic Sea (Latvia and Lithuania making up the trio). Additionally, on both occasions this Baltic grouping is characterised as 'limiting' and in one instance as 'potentially misleading.'

The effect of this is two-fold: a 'limiting' Baltic identity implies that Estonia's aspirations for its nation branding strategy (and the outcomes thereof) would be unable to fulfilled through an instrumentalisation of this pre-established regional identity, and that 'Balticness' does not provide an adequately competitive platform for these aspirations; furthermore, a 'potentially misleading' Baltic identity implies that incorporating a Baltic dimension into a nation branding

[86] Ibid, 52.
[87] Ibid, 37.

strategy would be inconsistent with the experiential reality of Estonia as a marketable entity. The second of these points sits in tension with Anholt's assertion that "marketing teaches us that people are just as often guided by their perceptions of things as by the reality of things."[88] At its core, this suggestion by the Estonian nation branding authorities that to brand the country as Baltic would be misleading should not be interpreted as 'misleading' in the conventional sense, as marketing, particularly where entire states are concerned, depends on the construction of a perception in the mind of the consumer that is often entirely at odds with the experiential reality of the product. Rather, 'misleading' in this instance may be more accurately understood as 'leading the audience to a perception that is inconsistent with the aspirations of the brand.'

If we expand our field of analysis around the use of the word 'Baltic' in this document we can see that its usage, on both occasions, occurs in close proximity to the word 'Nordic,' which is established as an oppositional term with its own set of both geographical and cultural meanings. Above all, it is constructed as an aspirational identity, its aspirational quality in turn carrying a temporal dimension. The document states that "a worldwide understanding of it as a Nordic country – both temperamentally and geographically – [would be] much more fitting and motivating"[89] This assertion operates in a dual temporality, on the one hand insisting that Estonia is already in possession of this Nordic identity and can legitimately market itself in the global marketplace as displaying 'Nordic' qualities (even if these qualities are only intrinsically acknowledged), and on the other hand orienting itself toward the future, describing how a broader understanding of Estonia as a Nordic country in the international imaginary would, in and of itself, enhance Estonia's competitiveness. To this end, we must consider Estonia's Nordic branding trajectory as an act of aspirational branding, at odds with the more realist branding frame surrounding the Balto-centric approach.

In order to better understand the reasons that a Baltic identity was deemed unsatisfactory in this instance, we should first expand on the importance of the interaction between the producers and the audience of this document. The *Eesti Stiil* portfolio was produced as the endpoint of an extensive research and development campaign involving cooperation between several parties: the Estonian authorities entrusted with the establishment of a nation branding strategy; an international corporate entity, Interbrand, whose experience in brand development,

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[88] Anholt, *Brand New Justice,* 12.
[89] Brand Estonia, *Eesti Stiil*, 51.

particularly in the sphere of nation branding, was well-established; and a smaller Estonian marketing company, Emor.[90] The effect of balancing both domestic and international perspectives in establishing Brand Estonia is that the resultant branding strategy should, if executed successfully and in accordance with each actor's natural interests, reflect a view of the country that is both marketable abroad while remaining palatable to a domestic audience. According to Anholt, "If ordinary citizens are made to feel instrumental in shaping and realizing the international aspirations of the country, this may help to create a stronger sense of national identity and promote social inclusion, by uniting the whole country in an objective examination of its strengths and weaknesses."[91]

An important aspect of this assertion is the need to create a brand identity that is able to motivate the citizenry of the state being branded to support the direction that the brand is moving in. The idea of 'motivation' draws our attention back to its usage within the portfolio, in which the authors describe a brand strategy which positions Estonia as a Nordic country would "more fitting and motivating" than one in which a Baltic identity is foregrounded. This acknowledges the importance of incorporating aspects of a national culture not only grounded in a realist approach, but to also acknowledge that a national community may, and frequently does, hold in its collective imaginary a vision of itself that is both aspirational in its direction, and a shade removed from how it is perceived externally.[92] However, the qualities that are palatable to a domestic audience are not necessarily the most marketable or competitive within an international marketplace.

This leads us to the obverse of this process of minimisation of traces of Balticness in the Estonian strategy, which is a proliferation of references to Nordicness in ways that are both geographical, and more broadly culturally constructed. These usages of the word 'Nordic' in the portfolio also exhibit a variable temporality, connecting historical processes, contemporary qualities, and aspirational, future-oriented objectives. 'Nordicness' is also established as a quality that extends beyond the nation and conceptions of national identity, and into the realm of both visual and verbal representation. For example, the strategy states its intention to incorporate "modest and cool Nordic colour schemes" into the strategy and mentions Estonia's "Nordic

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[90] Jansen, 'Designer Nations,' *Social Identities*, 128.

[91] Anholt, *Brand New Justice,* 146-147.

[92] N Kaneva & D Popescu, 'National Identity Lite: Nation Branding in Post-Communist Romania and Bulgaria', *International Journal of Cultural Studies*, vol. 14, no. 2, 2011, p. 193.

temperament and environment." For example, to state that "Estonia has historical ties with all of the Nordic countries", the document must first disregard the fact that Estonia also has well-established, and far more recent, historical connections to the other Baltic states due to their shared modern history. The handbook characterises Estonia's annexation by the Soviet Union as "an accident of history [which] links us in the minds of most people with the East instead of the West."[93] This underscores the importance of constructing a narrative within a nation brand that reinforces any assertions around identity that are made within the strategy, and also ...

However, the portfolio also acknowledges its international audience, and the understanding that this is the group that forms the core object of the branding strategy. As we have established, the primary outcome of a successfully executed nation brand should be, broadly speaking, a more positive perception of that nation vis-à-vis its competitors within the international marketplace. An important dimension of establishing a persuasive and effective nation brand is credibility. As with any branded product, consumers respond favourably if they believe the source on which they are basing their decision (in this case, a nation branding strategy) demonstrates a high degree of credibility. Therefore, a marketing strategy based on a more credible brand identity is likely to produce more positive outcomes.[94] When discussing nation branding, this often proves challenging. Unlike a new soft drink or a pair of sports shoes that have just entered the market, countries must navigate the preconceptions that their audience holds when seeking to rebrand themselves. To take Dinnie's example, Egypt is primarily associated with its historical sites and, consequently, its economy rests on a substantial tourism sector. If Egypt wanted to diversify and establish itself as a global centre for technology or business, it must first acknowledge that this is not how it is perceived by an international audience and craft its branding strategy to address both its aspirations *and* its existing brand image.[95] In a similar way, in attempting to establish itself as a Nordic country, Estonia must first acknowledge that this is not consistent with its existing perception within the international, or even regional, imaginary.

As a constituent republic of the former Soviet Union, it is still imagined in many circles to be Eastern European, or 'an Eastern Bloc country,' or even – perhaps most horrifyingly for the

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[93] Brand Estonia, *Eesti Stiil*, 65.
[94] M De Vierman, L Hudders & M Nelson, 'What Is Influencer Marketing and How Does It Target Children? A Review and Direction for Future Research', *Frontiers in Psychology*, vol. 10, no. 2685, 2019 p. 3.
[95] Dinnie, *Nation Branding,* 37-41.

Estonians – 'Russia.' At a more granular level, the 'Baltic' label clings to Estonia, despite its efforts to shift its alignment into the Nordic space. This was clearly an issue that arose in the preparation of the *Eesti Stiil* portfolio, as credibility of the proposed Nordic brand direction is broached on several occasions. Firstly, it is addressed in straightforward fashion in the foreword to the document, prepared by prominent Estonian translator and columnist Enn Soosaar, who states quite bluntly that "Estonia today is not yet a Nordic country."[96] The most crucial modifier in this sentence is the word 'today,' which introduces an element of temporality, of which we spoke above. This conceptualisation of Nordicness as a process, or a gradient against which something can be considered more or less Nordic than something else, is carried through the document as a type of *leitmotiv* against which other branding vectors are projected. However, these trajectories of identity do not constitute a competitive or marketable basis for a brand strategy as they are dependent on consumers being able to envisage what *will be* rather than was *is*, and making choices based on what amounts to an unfinished brand narrative. If we turn to Lagerspetz' metric for quantifying Nordicness among the Baltic states it becomes clear that, while Estonia is certainly in possession of some important markers of Nordic identity, it only partially exhibits, or lacks entirely, several key characteristics.[97] Many of the divergent characteristics, such as an absence of the Nordic model of social development, can be attributed to the more neoliberal economic posture swiftly assumed by Estonian governments following the collapse of the Soviet Union. While these qualities may not be consistent with an international understanding of what it means to be a Nordic state, they are qualities that appeal to private sector organisations operating in the international marketplace and which improves the equity of Brand Estonia.

To this end, the challenge of incorporating both entrenched and highly marketable neoliberal economic characteristics into a branding strategy alongside a narrative of progression towards a Nordic identity. The Estonian nation branding strategy, as reflected in the *Eesti Stiil* portfolio, attempted to eliminate this question of completion with regards to its Nordic brand direction through the formulation of a slogan that at once firmly grounds the Estonian brand identity in a discourse of Nordicness while simultaneously reshaping its divergence from an idealised or fully realised model of Nordicness as a positive brand quality. Rather than a Nordic

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[96] Brand Estonia, *Eesti Stiil*, 39.

[97] Lagerspetz, 'Nordic Countries'*Cooperation and Conflict*, vol. 38, no. 1, 2003, p. 51.

country in-the-making, in possession of some but not all the requisite qualities to consider itself 'fully Nordic', Estonia opted to position itself as "Nordic with a Twist."[98] This emerged from the research presented in the document showing that "a strictly 'Nordic' grouping … was not seen to be entirely credible."[99]

3.3 Building a Nation Brand for Latvia

While Estonia embarked on its nation branding strategy it followed a relatively traditional route, procuring the services of an established international branding agency (Interbrand) which, in partnership with a local brand development agency, developed a strategic framework from which a campaign could be elaborated, Latvia took an alternative approach. The Latvian Institute instead commissioned a report from the Oxford Said Business School, under the supervision and guidance of prominent nation branding practitioner Wally Olins, to develop a direction for a similar strategy to that put in place by Estonia. The reasoning behind this difference in approach is likely due budgetary differences. It has been reported anecdotally that the budget for Estonia's nation brand development was approximately €2.3 million, whereas Latvia's budget was substantially smaller, standing in the order of €500,000.[100] It is unlikely that this amount would have been sufficient to procure the services of a large, multinational branding agency for such a project, and thus a lower-cost alternative was required.

It is worth noting from the outset that this report was commissioned in 2003, two years after Estonia had commissioned its first nation branding strategy. For this reason, it is appropriate to make relational observations about the effect that the Estonian strategy may have held over the development of Latvia's nation brand, whereas the opposite would not necessarily be true in the Estonian case. The document that emerged from Latvia's commission, entitled *A Brand for Latvia*, can reasonably be considered to parallel the *Eesti Stiil* portfolio in text type and content and therefore can be examined using the same methodology to produce comparable data.

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[98] Brand Estonia, *Eesti Stiil*, 67.
[99] Ibid, 61.
[100] S Frasher et al., *A Brand for the Nation of Latvia*, Oxford Said Business School, 2003, p.53.

If we begin with the same impressionistic content analysis, as in the Estonian case, we can observe identical themes emerging through the words that appear with the highest frequency.[101] 'Latvia,' 'Latvian,' 'brand' and 'country' offer virtually no critical insight into the mechanics of the strategy beyond informing us that we are looking at a document dealing with a branding strategy for the country of Latvia. However, the next cluster of words contain several frequently used terms that are, by turns, significant and uncharacteristic of a nation branding document. Most interestingly here is the cumulative frequency of the terms 'Russia' and 'Russian' which, taken together, occur 116 times. In a document that seeks to outline the unique and most marketable characteristics of an independent state, a very high number of references to another, neighbouring state may indicate that this third state plays a significant role in framing the perception of the branded state abroad. As noted previously, however, the simple frequency of usage of these terms is only useful to the extent that we are able to clearly observe which themes are most prevalent within the document; a more detailed content analysis is required in order to gauge the effect of these terms in context.

Figure IV: Source: Generated at https://tagcrowd.com; accessed 20 April 2020.

The high frequency of references to 'Russia' and 'Russian' in this document fall into two broad categories that we might characterise as 'external' Russia and 'domestic' Russia. In

[101] Krippendorf & Bock, *Content Analysis*, 38.

essence, the 'Russia' that is imagined by those tasked with engineering a Latvian nation branding strategy is simultaneously an external force with which Latvia is involved on a range of political, economic and cultural levels; and a force that forms part of Latvia itself through the sizable ethnic Russian minority that continues to live in Latvia, and through the experiences and knowledge possessed by ethnic Latvians due to the decades of Soviet occupation and associated policies of russification that were put in place during that time. In the first instance, the enduring economic ties between Russia and Latvia are seen as a highly marketable facet of Latvia's brand offering, and one that may appeal to businesses seeking a gateway to the Russian market within the European Union; "the place within Europe that best understands Russia".[102] This statement is supported with *vox pop*-style quotations from members of the Latvian public who share their own opinions on, or experiences with, Russia: "I must really use my brain -- not my emotions -- to imagine there is an honest Russian company;" "...Russians have always been Russian. You really don't know what tricks they're going to play;"[103]

To expand on this taxonomy, the strategy characterises the 'external' Russia as both a source of ongoing consternation, and as a source of economic benefit. While this may, at first glance, appear to constitute a unique and marketable foundation on which to ground a branding initiative, the authors are quick to assert that any branding strategy that appeared to position Latvia as being too deeply and persistently connected to an external Russia would be unpalatable to the Latvian public. An alternative arose, however, in the form of Russia as a domestic entity represented by Latvia's Russian minority and its history as an occupier. The document notes, without providing a causal explanation for this assertion, that "Latvia was more Russified during Soviet times than either of its Baltic neighbours."[104] The strategy, in its attempt to reshape the perception of Latvia's enduring Russian connections, therefore attempts to reframe Russia; from an unknown and unpredictable outside force acting on Latvia, into a body of knowledge and experience possessed by the Latvian populus and intrinsic in the Latvian psyche. This positions Latvia and, importantly for businesses, the Latvian workforce as gatekeepers, of sorts, to businesses seeking to access the Russian market.

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[102] Frasher et al., *A Brand*, 3.
[103] Ibid, 8.
[104] Ibid, 22; Anecdotal evidence suggests this may have been due to the importance of Riga as the largest non-freezing port in the Baltic republics, and thus an important point on the trade route from Russia to Europe.

However, while the strategy strongly foregrounds Russia as both a challenge and an opportunity to be grappled with in marketing Latvia abroad, it is the idea of Balticness that emerges as a more unequivocal 'brand essence' (to borrow from the Estonian vernacular). In fact, it is the idea of an 'essential' Balticness that crystallises as the frontrunning concept for Latvia's branding strategy. To return briefly to our word cloud (Fig. IV), we can see that the frequency of use of the word 'Baltic' is significantly lower than that of 'Russia' and 'Russian,' however its usage within the document shapes it as a more harmonious, unifying, and positive brand direction that draws from more endogenous, pre-Soviet factors than the Russo-centric alternative. The document characterises Latvia's relationship to the idea of Balticness as easier, and more natural, than that of Lithuania or Estonia: "To the outside observer, Latvia is first and foremost a Baltic country, distinct from both Scandinavia and Germany… Latvia is on its own, arguably the most Baltic of the Baltics."[105]

Historically, this association with a Baltic identity is grounded, according to the authors, in the emergence of the Latvian nation from the ancient Baltic tribes that inhabited the region until its occupation by Sweden in the 1600s. Weaving historical narratives into nation branding strategies is not an uncommon practice as it lends the competitive identity a sense of continuity and authenticity that is otherwise difficult to achieve. However, in Latvia's case this course develops a relational dimension with regards to Estonia and Lithuania. In the first instance, if the Latvian nation brand intends to construct Latvia as the "the keystone of the Baltic region," it must first ensure that the idea of the Baltic states as a cohesive regional grouping is credible.

In order to be a regional leader, Latvia must have a region to lead. For this reason, any branding strategy that seeks to position Latvia as the most Baltic of the Baltic states must be careful not to do so in such a way as to alienate Lithuania and Estonia from the same regional grouping. To this end the strategy is inconsistent, by turns suggesting that Latvia's Baltic neighbours are party to a common identity grounded in shared historical, political, and geographical qualities ("The Baltic is a sea and a region, and the three countries that are collectively called "the Baltics" also share much common history and have common aspirations in terms of EU accession"[106]) while also alienating them from other, no less significant dimensions of common identity ("The Estonians are really a Nordic race in terms of linguistics

[105] Ibid, 47.
[106] Ibid, 19.

and current aspirations. The Lithuanians are more clearly central European, and maintain a tie with Poland from their days as a common empire."[107]), while failing to incorporate these polarised opinions into a cohesive narrative that situates Latvia as the "the keystone of the Baltic region" and of a pan-Baltic identity.

A possible explanation for the divergence in approaches between the Estonian and Latvian strategies may be attributable to the degree of professional experience of those responsible for branding the respective nations, and their level of familiarity with those nations prior to undertaking this task. As mentioned above, in embarking on their branding strategy Estonia procured the services of a large, international branding agency with extensive experience in both corporate and public-sector to co-operate with a local marketing agency staffed with Estonian branding professionals and based in Tallinn. At the same time, Latvia's budget has been anecdotally reported as being significantly lower than Estonia's and therefore the resources available to the Latvian authorities were correspondingly more limited. This prompted Latvia to implement a more novel approach and procure the services of graduate students at the Oxford Said Business School to develop a nation branding strategy under the supervision of high-profile nation branding professional Wally Olins.

3.4 Specificities of Branding Estonia and Latvia as Transitional States

As outlined by Szondi, it is important to bear in the mind that both the Estonia and Latvian nation branding projects described above were formulated and implemented at a time when these states could still be described as 'transitional.' This means, at its most basic level, that these countries, along with many others in Central, Eastern, and South Eastern Europe, the Caucasus and North Asia, were transitioning away from the type of planned economy that typified communism in these regions, towards a market-based economy, as was already in place in most of Western Europe. The effects of such a transition are not confined to the economic sphere, however, and require (and produce) social and cultural changes that must be accounted for when examining a nation branding strategy.

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[107] Ibid, 19.

In terms of analysing the nation branding strategies implemented during this period in their history, we must bear in mind that the objectives of transitional countries in undertaking a branding initiative are likely to differ from those of long-standing market economies as the latter have a 'product' (the nation) which has already crystallised in the international imaginary and which has already accumulated brand equity in the marketplace of nations. Transitional states, however, must build a competitive identity from a less advanced posture, and often use nation branding as a method to 'introduce' themselves to a global audience which may, up until that point, only have known them under the identity of a federal superstructure; for example, few people outside of the immediate region prior to the early 1990s may have had an understanding of Yugoslavia or the Soviet Union that was adequately granular enough to assign characteristics to each of their individual constituent republics. Consequently, the brand recognition of these individual and newly independent entities was extremely low within the international marketplace.

In the case of both Estonia and Latvia, the idea of a Baltic identity was a construct that first crystallised in its current form due to a set of policies and historical junctures taking place during the Soviet occupation of what we now consider to be 'the Baltic states.' It is this identity that both Estonia and Latvia carried with them during their transition period, and into their first attempts at nation branding. As mentioned previously, and expanded upon by Szondi, these legacy identities may prove incompatible with the aspirations of states in transition as they are too deeply connected to what the state was, rather than what it is seeking to become.

To take Szondi's six-metric framework of objectives for nation branding of transitional states as our starting point, we can observe a number of convergences and divergences within the Estonian and Latvian branding strategies as they relate to these points. Firstly, Szondi indicates that transitional countries may use nation branding "[to] distance the country(ies) from the old (economic and/or political) system, which existed before transition."[108] In the Estonian case, this is achieved by building a case within the branding strategy that the international perception of Estonia is based on a misunderstanding or an outright fallacy connected to an "an accident of history [that] links [Estonia] in the minds of most people with the East instead of the West."[109]

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[108] G Szondi, 'Role and Challenges', *Place Branding,* 10-11.
[109] Brand Estonia, *Eesti Stiil*, 65.

Estonia's perception annexation to the Soviet Union was nothing but an "accident of history" that is now being demonstrated to be so through a cultural, economic, and historical rapprochement with the Nordic countries, a grouping to which it naturally belonged all along.

We can see traces of the difficulties in tailoring a nation branding strategy to a country in transition in the Latvian strategy more so that the Estonian in the sense that Latvia expresses an apprehension to decisively move away from identity markers inherited from a Soviet-era legacy. This varying approach to a sense of movement becomes a more notable feature once the documents analysed above are fully operationalised by their respective states in the form of logos and slogans in the years following their release. While Estonia opts for more dynamic language in the form of its long-standing slogan 'Estonia: Positively Transforming,' Latvia chose to tread a safer and less dynamic path with the tagline 'Latvia: The Land that Sings.' The former, in incorporating the term 'transforming' invited the responder to visualise both a 'before' and an 'after,' as well as a sense of change and growth. The latter, on the other hand, leans more heavily on an historical identity marker (the importance of music and singing in the Latvian culture dates back many hundreds of years) to create a sense of continuity which supports the recommendations made by Spencer Frasher et. al. that a consistent Baltic identity would assist in bolstering Latvia's competitiveness vis a vis its neighbours.

Chapter IV:
New Branding Paradigms in Estonia and Latvia

Until this point, we have focused our examination of the historical trajectories of Estonia and Latvia's nation branding strategies since the collapse of the Soviet Union. We have observed a divergence in their approaches to engaging with 'Balticness' and 'Nordicness' as aspects of their respective competitive identities. These divergences have, over time, become compounded through decisions made at a number of critical junctures, often associated with the necessity to replace a Soviet-era legacy institution with something new. These new institutions, in turn, represent a new platform onto which an ongoing nation branding strategy can be projected and elaborated.

In order to complete this analysis, this chapter will examine the current state of Estonia and Latvia's nation brands and attempt to trace the visual, textual, and thematic elements contained within these current strategies to those present in previous iterations of their strategies. From a methodological perspective, a number of challenges arise when examining the documents produced within the framework of a nation branding strategy across time and seeking to compare these documents. The most significant shift has been the shift in delivery method of these materials associated with technological advancements that have occurred in the approximately 20-year period between the early 2000s and 2020. This period has seen a huge shift away from analogue modes of delivery towards more digital modes which, in many cases, has resulted in the production of more interactive, customisable, and targeted nation branding products. The challenge in this sense is that the materials from Estonia and Latvia's first attempts at nation branding often do not find directly equivalent materials in the most recent iterations of their respective strategies and so the coding systems must be adapted in order to identify thematic threads that run between both current and historical materials.

As mentioned above, the intervening period between the first attempts at nation branding by Estonia and Latvia and the release of the current iterations of their brands has seen vast changes in how information is exchanged, presented, transmitted, and received. According to Laughey, we, as producers and consumers of information, have moved beyond the point where media are a substitute for a real-world experience, to a point where media are, in themselves, the

experience.[110] The effects of this shift have been felt across sectors, and the realm of nation branding has not been immune to these changes. However, the extent to which states have adapted to these changes has been uneven, and the subsequent imbalances in take-up of new modes of communicating nation brands is highly when examining regional identities in the nation branding space.

4.1 Estonia and the Nordic 'Modular' Branding Paradigm

A strong trend in Nordic nation branding practices in approximately the last five years has been a highly digital-focused approach that seeks to create versatile and interactive nation branding materials that can be used by those participating in the promotion of the target nation abroad. The foundation rationale behind this approach is that nation branding is most effective when it achieves support from the populus, and when non-state actors (particularly businesses) can be leveraged as a platform for the transmission of the brand. As Aronczyk notes in her critique of the democratic dimensions of nation branding,[111] conventional nation branding strategies arise from inherently top-down power structures and it is for this reason that "[countries] have ... very little power to control the way those reputations are treated or mis-treated by their own citizens."[112] To assist in making the brand more accessible to those who may be in a position to disseminate a nation brand, the Nordic countries, led by Finland in 2015, have shifted their focus away from branding through the production of complete, finished products such as brochures, posters, and promotional videos towards a more DIY approach. This takes the form of collections of what we might describe as the 'raw materials' of a brand that are gathered in a centralised online repository alongside instructions for their usage to promote their usage in a manner that is consistent with the brand's direction. These resources have been implemented in all Nordic countries as part of place branding initiatives at various levels of government (whether it be national or local) and have been variously termed 'toolboxes' (in the

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[110] D Laughey, *Key Themes in Media Theory*, McGraw Hill Publication, New York, New York, 2007, p. 163-164.
[111] Aronczyk, 'Living the Brand', *Communication*, 41-65.
[112] Anholt, *Competitive Identity',* 53.

case of Finland, Denmark, and the City of Oslo), or 'toolkits' (in the case of Sweden). These materials (which we will call 'toolboxes' as a generic term), share a range of common elements intended to be adapted, deployed, and modified to meet the needs of both the user and the intended audience. These elements frequently include a custom font, an image library, presentation templates, or custom graphics and illustrations.

While the 'toolbox' approach to branding has been adopted widely in the Nordic region, the idea of an interactive and, most importantly, public-facing branding toolkit has not been picked up elsewhere in Europe. This suggests a divergence in the metadiscourse of nation branding on a regional level, and a divergence in the manner in which this "fashion of governance" is performed between regions.[113] In the Estonian case, an examination of the contemporary materials of nation branding becomes less about the messages that are being transmitted at a textual or visual level within the strategy, but more about the medium that is being used to transmit those messages. By shifting from a top-down approach to the more interactive toolbox approach, Estonia is participating in a Nordic discourse of how nation branding should be performed.

Because of the more diffuse, customisable nature of the toolbox repository method or organising information, determining the frequency of particular terms and their use within context becomes more challenging as the context for their usage is ultimately determined by the end user of the materials and less-so by their creator. However, we can draw useful data from an analysis of the structure of the system used to store and present the materials. In the Estonian case, the catalogue of branding materials uses a system of tags to order, and assist users in sorting through, the available information. This bank of tags is pre-defined, and tags are attached to documents, templates, images, and icons as a means of organising them into thematic categories. To return to our keywords from the analysis of the *Eesti Stiil* branding portfolio, Nordic and Baltic, we can observe that the frequency of usage of these terms within the Estonian branding toolbox operates in a very similar fashion. Firstly, the term 'Baltic' occurs 24 times within the toolbox, or 19 times if duplication within translated versions of documents are removed. By contrast, the term 'Nordic' is used 16 unique times. However, if we examine the

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[113] K Valaskivi, 'Circulating a Fashion: Performance of Nation Branding in Finland and Sweden', *Place Branding and Public Diplomacy* vol. 12, nos. 2-3, 2016, p.139 -151.

usage of these search terms within the context of the organisational system structured around a pre-defined set of 'tags', we can observe a, perhaps surprising, omission: while it is possible to filter toolbox materials using the tag 'Nordic', a tag corresponding to the term 'Baltic' has not been programmed. That is to say, toolbox users are proactively presented with the option to filter branding materials according to those that display 'Nordic' qualities, however they must actively search for the term 'Baltic' in order to access corresponding materials. While the omission of this tag may be seemingly inadvertent, it is helpful to examine other comparable, yet less logical, organisational terms that are used to organise the toolbox; users can filter materials by the tags 'America,' 'Europe,' 'planet,' 'Scandinavia,' and even 'Africa,' making 'Baltic' as a tag almost comically conspicuous in its absence.

Secondly, a more critical evaluation of the usage of the term 'Baltic' as a descriptor of toolbox materials reveals that 12 of which refer to images of a specific type of seacraft referred to as a Baltic Work Boat, and a further two that refer to features of the Estonian built environment such as the Balti Jaam train station or the Balti Jaam market. All remaining uses of 'Baltic' as a search term refer to the Baltic Sea. The key feature of all these instances is that the current iteration of the Estonian nation branding strategy features a paucity of references to Balticness on a cultural or historical level, and instead exclusively deals with this concept in geographic or, more specifically, hydrographic, terms.

This demonstrates a high level of consistency between the initial Estonian nation branding strategy as outlined in *Eesti Stiil*, and the strategy currently in place. If we assess the prevalence of Balticness within the strategy according to the frequency of terms and phrases relating to this concept, we can see very little shift over time in the frequency or the contexts in which these are used. If we take the broadly negative posture of *Eesti Stiil* towards branding Estonia in a way that draws it closer to a Baltic identity, we can see that there has been no significant rehabilitation of Balticness as a competitive identity within the perception of the Estonian nation branding authorities. This is despite the fact that the Baltic states have shown strong economic development since the early 2000s, through the Baltic Tiger phase of the mid-2000s and (2007-2008 Global Financial Crisis notwithstanding), and leading to the current strong economic performance of recent years.[114] The current GDP annual growth rate in Estonia

[114] Trading Economics, *GDP Annual Growth Rate | Europe*, Trading Economics, 2019, <https://tradingeconomics.com/country-list/gdp-annual-growth-rate?continent=europe>, viewed 20 May 2020.

and Lithuania is higher than any of the Nordic countries, with Latvia sitting below only Denmark, yet still well above the EU average. In a period when it is demonstrably economically preferable to be Baltic rather than Nordic, we must look beyond mere figures to understand why Estonia has persisted with a Nordic-facing nation brand despite the strong economic performance of the Baltic states.

As mentioned in previous chapters, Estonia first undertook to actively brand itself in the early 2000s, at a time when it was not yet a member of the European Union, NATO, or the eurozone. Accession to these Euro-Atlantic institutions was identified as among the utmost priorities of the Estonian government at the time, and nation branding was seen as a relatively new discipline with the potential to expedite Estonian accession by raising the visibility of Estonia in the international marketplace. However, while Estonia considered itself to be making important strides towards meeting accession targets for these institutions, Latvia and Lithuania were not considered to be keeping pace. As Szondi notes, an important objective for states in transition when undertaking nation branding projects is to "*position the country as [a] reliable and eligible member of the new system … or … of an international community*"[115] A tactical approach to this objective is to position the transition state as a member of some grouping that is already unequivocally integrated into the new system. At this juncture, the significance of a Nordic identity emerged as an important trait of the Estonian national identity. As Aronczyk states, 'appropriating Nordicness allowed the Estonian participants in the branding initiative to project their history back in space rather than time, to see their ancient roots as anchored in territorial rather than temporal dimensions'.[116] This required the branding agency to undertake a 'delicate exercise in spatial manipulation' in order to conceptually distance contemporary Estonia from Russia and draw out its proximity to Scandinavia and Finland.[117]

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[115] Szondi, 'Role and Challenges', *Place Branding,* 10.
[116] Aronczyk, *Branding the Nation,* 142.
[117] Ibid, 142.

4.2 Latvia and the 'Monolithic' Branding Paradigm

With advances in digital brand delivery very much characterising the contemporary Estonian approach to nation brand delivery and dissemination, perhaps even more so that the content of their strategy, the same cannot be said for Latvia's approach to the practice. If we recall the modular, toolbox-based approach to nation branding that is prevalent throughout the Nordic space, the Latvian branding authorities have pursued a more conservative methodology in branding their country.

To reiterate one of the key recommendations to arise from the *Brand for Latvia* strategy document (as examined in detail in the previous chapter), the Latvian Institute was proposed as the best-positioned and most logical agency to take custodianship of the Latvian nation brand. This recommendation was enacted, and since the early 2000s the Latvian institute has taken ownership of the development, management and dissemination of Brand Latvia.

Unlike the Estonian strategy, Latvia has opted against the toolbox approach that is typical of place branding projects in Northern Europe, instead proposing a strategy consisting of more fully realised, less versatile branding materials. These include brochures, fully rendered and formatted PowerPoint presentations (as distinct from the PowerPoint templates often found in branding toolboxes), photo galleries, factsheets, videos, and virtual tours of a small selection of sites of national importance.[118] These 'resources,' as they are termed, appear alongside a series of short articles on topics of relevance to contemporary Latvia such as society and culture, nature, economy, and history. These form the core nation branding materials that were consciously constructed in order to disseminate a competitive identity and will therefore constitute the subject of analysis. However, by adopting (or perhaps more accurately, maintaining) this mode of disseminating its brand, Latvia is opting not to engage of Nordic discourses of how nation branding should be performed and instead aligning its approach more closely with the methodologies of most Central European countries. It would, however, be

[118] At the time of writing, the webpage hosting these virtual tours did not appear to be functional and thus they have been excluded from any analysis.

inappropriate to interpret this as an entirely conscious decision on the part of those responsible for custodianship of Latvia's nation brand.

The first point to note is the strong proliferation of references to Balticness in the Latvian strategy as compared to the Brand Estonia's efforts. At time of writing, the Latvian Institute website features a total of approximately 235 mentions of the word 'Baltic,' however many of these occur within materials outside of the core nation branding materials such as blog posts and syndicated news articles on topics of relevance to Latvia's achievements or promotion abroad. Nevertheless, it is immediately clear that, by comparison to the Estonian strategy, the idea of Balticness assumes a far more prominent role for Latvia, framing many of the major competitive claims made within. For example, the interactive fact sheet entitled *The Many Faces of Riga* features seven mentions of the word 'Baltic,' three of which are hydronymic and the remaining four of which emphasise Riga's importance within the Baltic States. If we consider this in relation to one of the key recommendations arising from the 2003 branding document examined in the previous chapter (that is, to give greater weight to Riga as the capital of the whole Baltic region), we can see that much of the importance placed on the potential for the Latvian capital to assume the role of a capital city of the Baltic Region has been picked up and integrated into the Latvian nation branding strategy.[119] This is reinforced through references to its size (Riga as "biggest city and the key economic centre of the Baltic States"), its infrastructure ("Rīga's ice-free port is the biggest in the Baltics") and its strategic and commercial significance ("In re-cent decades Rīga has de-vel-oped into the key fi-nan-cial and trade cen-tre of the Baltics").[120] The net effect of these claims is two-fold: to promote Latvia's assets to an external audience, and to further the Baltic states as a cohesive regional unit with Latvia as its 'keystone' member.

A challenge posed by Frasher et al. was the issue of how to successfully operationalise the idea of a cohesive, yet Latvian-led, Baltic identity without resorting to an explicit statement of this position.[121] The challenge for those responsible for executing this recommendation was to identify characteristics or moments that connected the Baltic states in an immediate and symbolic way, even for those with limited prior knowledge of the region. In the intervening period between the initial 2003 strategy paper and the current iteration of the Latvian branding

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[119] Frasher et al., *A Brand,* 6.

[120] Latvian Institute, *The Many Faces of Riga*, Latvian Institute, 2020, <https://www.latvia.eu/brochures/many-faces-riga>, viewed 15 April 2020.

[121] Frasher et al., *A Brand,* 48-49.

strategy, a pivotal historical event has been reshaped as a core element of Latvia's key branding messaging to fulfil this need: the Baltic Way.

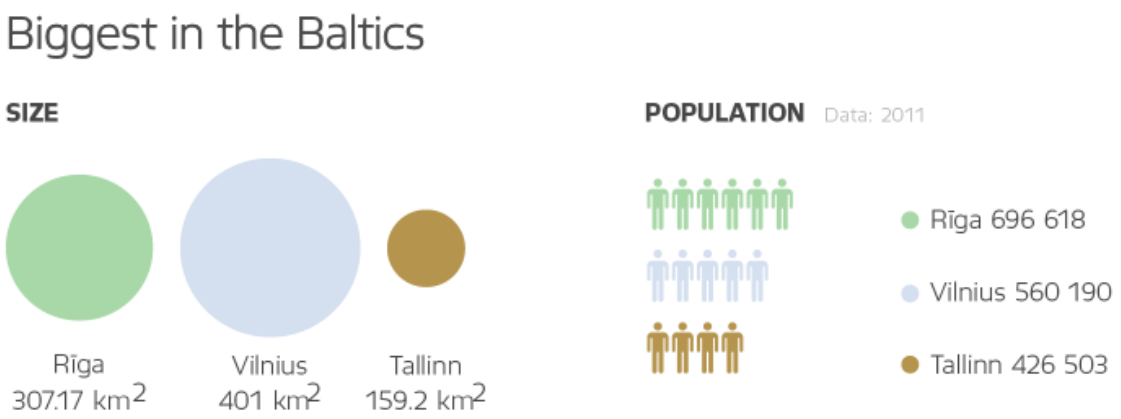

Figure V: The Size of Riga Compared to Other Baltic Capitals by Area and Population. Source: Latvian Institute, *The Many Faces of Riga* [122]

The Baltic Way (sometimes referred to as the Baltic Chain) was an act of popular demonstration that took place on 23 August 1989. Occurring simultaneously across all three Baltic States (at the time, of course, still part of the Soviet Union), an estimated two million Estonians, Latvians, and Lithuanians joined hands to create a human chain spanning a distance of almost 700km and joining the three Baltic capitals of Tallinn, Riga and Vilnius. This event is widely remembered and memorialised throughout the Baltic states as a pivotal moment in the trajectory of their collective occupation, and a milestone on the path towards regaining independence for these states.[123] While in the Estonian strategy there is no mention of this event, the Latvian Institute has operationalised it as a relatively significant concept within its branding arsenal. There are approximately 50 mentions of the Baltic Way on the Latvia.eu website, around 40 of which are news reports or blog posts reporting or reflecting on commemorations or anniversaries of the original Baltic Way. The image of the Baltic Way provides an immediately comprehensible and highly visual representation of the complex historical processes that

[122] Latvian Institute, *Faces of Riga*.
[123] D Eglitis & L Ardava, 'The Politics of Memory: Remembering the Baltic Way 20 Years after 1989', *Europe-Asia Studies*, vol. 64, no. 6, 2012, pp. 1033-1059.

underpin the core concept of Latvia's positioning of itself within its nation branding strategy. However, if we focus on the usage of the Baltic Way within the core branding materials, we can identify a usage of the memory of this event that speaks to a unique and competitive branding angle assumed by the Latvian authorities: peace and, more specifically, peaceful resistance.

Peace as a commodifiable and marketable quality is highly sought after as it speaks to a perception of a nation as an attractive space for foreign direct investment. The idea of a nation founded on peace connects to related perceptions of stability and good governance, qualities that tend to be associated with an in-flow of foreign capital. A recurring theme that we see throughout the Latvian strategy is an instrumentalisation of the legacy of the Baltic way, and an extrapolation of the moral and cultural characteristics of this event into other spheres of Latvian society. A hashtag, *#actbalticway*, was introduced in 2019 to commemorate the 30th anniversary of the Baltic Way, and promoted across the Latvian nation branding platforms, where it still retains a prominent position. However, the hashtag is not used exclusively for the purposes of commemoration but, rather, to reimagine this event as indicative of a broader set of behaviours that typify the people of the Baltic states and particularly, the people of Latvia. For example, the promotional video frames the 'Baltic way' as a cultural-behavioural framework as equally applicable to taking action on climate change as it is to resolving schoolyard bullying or fighting discrimination. This porous delineation between Balticness and Latvian-ness is consistent with broader trends within the Latvian nation branding project which, as we have already established, is premised on the idea of Latvian as the most Baltic of the Baltic states.

The co-opting of the Baltic Way is not only an inward-facing phenomenon. As is the case with many aspects of nation branding, it is a process of taking aspects of a national (or in this case, regional) culture and commodifying them for export abroad. In this case the very historically specific idea of holding hands and forming a human chain to protest against the ongoing annexation of the Baltic states by the Soviet Union is universalised and packed for export. For example, in 2019, to commemorate the Baltic Way and to resist the tightening grip of Beijing over the territory, the people of Hong Kong staged the Hong Kong Way, a peaceful protest in the style of the 1989 Baltic Way. While Lithuania went to lengths to distance itself from this event, citing its ongoing compliance with the One China Policy as the reason, Latvia incorporated this exporting of a Baltic-wide mode of peaceful resistance into its branding strategy, further projecting a Baltocentric Latvian identity into the international marketplace. To

refer back to Anholt's Hexagon of Competitive Identity (figure III, p. 52) we should recall that Anholt identifies people as one of the six 'natural channels' of competitive identity construction. He is careful to note that the 'people' in this sense are not only those that are highly visible outside a country's borders such as sports stars, film stars, musicians and political leaders, but also the everyday citizens of that country who can assist in shaping international perceptions of that country through their dominant behavioural patterns and prevailing national character.[124] In this sense, we may see the foregrounding of the Baltic Way and its extrapolation from an historical event into a broader marker of national character as a means of both strengthening the 'people' channel of the Latvian brand, while also drawing this channel into the broader meta-narrative of Latvian Balticness that underpins the strategy on the whole.

An additional historical motif that emerges prominently in the Latvian branding strategy is that of Balticness as an ethnic concept, rather than a strictly geographical construction. The branding materials published on the Latvian Institute feature among them three separate articles that refer to 'Baltic tribes' or 'Curonian tribes' as the original and ancient residents of the area that we know today as Latvia and Lithuania. While Aronczyk's assessment of the role of spatial projection in nation branding was applied to Estonia, we might see in the Latvian case an example of the alternative case being expanded.[125] If we take as our starting point the assumption that those themes and narratives that have been included in the strategy have been included for the reason of enhancing the competitiveness of the brand, we must attempt to interrogate how these ancient tribes contribute to the competitiveness of the modern Latvian state. As mentioned in the previous chapter, a challenge in the construction of any nation brand, particularly one which is seeking to attempt the rebranding of a nation, is to shift the brand perception in the eyes of the public while remaining within the realm of credibility. To this end, a certain amount of work is required to ensure that the consumer of the brand is made aware of some of the key narratives that underpin the new direction the brand is taking. By strategically incorporating narratives of pan-Baltic history into its strategy and, at the same time, establishing Latvia as the inheritor of these legacies of historical Balticness.

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[124] Anholt, *Competitive Identity*, 25-26.
[125] Aronczyk, *Branding the Nation,* 142.

4.3 Nation Branding and the Private Sector

While the initial nation branding initiatives introduced and examined in the previous chapter served only as, in effect, directions to government agencies on how and why their nations should be branded, the intervening twenty years have seen elements of these strategies adopted by the private sector. An extensive body of literature exists on the intersection between nation branding and private sector actors. Within this field of inquiry, an emerging literature has developed to examine the instrumentalisation by state actors of their national airlines as tools for soft power expansion and the dissemination of a nation branding strategy.

This has been approached in a range of different ways, although is most commonly associated with large scale operations based in the Gulf states. Indeed, it is difficult to talk about the economic development of such states as the United Arab Emirates without discussing the role of Emirates Airline or Etihad Airways in shaping this country as a global nexus for the transport of goods and people.[126] It is equally difficult to overlook the role that Qatar Airways has played in reshaping the international perception of Qatar as a global, connected, and modern country.[127]

Outside of the Gulf region, Turkey has been able to leverage its advantageous geographic position as a crossroads between Europe, Asia, and Africa in order to build up a national airline that now holds the distinction of flying to more countries than any other airline in the world.[128] Not only has this elevated Turkish Airlines to the status of a global brand, but it has in turn raised the visibility of 'Brand Turkey' which is now highly visible in many emerging and developed markets across virtually all global regions.[129] However less attention has been given over to examining how these principles have been applied on a smaller scale in the case of states seeking to instrumentalise a national air carrier for nation branding purposes, yet where huge hub

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[126] O'Connell, J F (2011), The Rise Of The Arabian Gulf Carriers: An Insight Into The Business Model Of Emirates Airline, *Journal of Air Transport Management*, 17:6, November, pp. 339-346; O'Connell, J F & Bueno, O E (2018), A Study Into The Hub Performance Emirates, Etihad Airways And Qatar Airways And Their Competitive Position Against The Major European Hubbing Airlines, *Journal of Air Transport Management*, 69, June, pp. 257-268.

[127] Petcu, C G (2017), *The Assessment of the Role of Qatar Airways in the Economic Development of Qatar*, Unpublished Master's Thesis, University of Qatar, Doha.

[128] As of 27 March 2020 Turkish Airlines temporarily suspended all international flight operations due to the unfolding COVID-19 pandemic. It is anticipated that full network operations will resume in due course.

[129]

operations such as those that have been built up in the Gulf states are clearly unachievable for either financial or geographical reasons, or a combination of the two.

However, in terms of examining the cross-pollination of nation branding aspirations as outlined by a government at a state level and its incorporation into corporate marketing strategies within commercial enterprises, the aviation sector offers a unique lens for analysis. The benefit of examining airlines as a canvas for nation branding is that meaning is constructed within this sector in a uniform way in virtually all countries and regions globally, making aviation marketing a "globalising genre in tourism."[130] Certain internationalised tropes, such as inflight magazines, livery, paid advertising and so forth, have emerged in this sector and are realised consistently in nearly all cases. This is particularly true when comparing Estonia and Latvia as a result of the specific set of changes that these aviation markets were subjected to during their post-Soviet restructuring.

In 1923, Russia's first airline, Dobrolet, was established for the purposes of connecting Russia and supporting the country's economic development. In the 1930s Dobrolet was rebranded as Aeroflot and it was under this name that all civilian aviation, as well as a wide range of military and space aeronautics, was operated in the Soviet Union. The business structure was, of course, that of a centrally controlled, fully government-owned enterprise with its headquarters in Moscow. However, the late 1980s and early 1990s saw Aeroflot implement a range of commercial and structural changes flowing from the *glasnost* and *perestroika* reforms that had begun in the mid-1980s. The outcome of these reforms was, inter alia, a degree of devolution of centralised control of parts of the airline to regional subsidiaries based in constituent republics and regions throughout the Soviet Union. When the Soviet Union collapsed, these constituent republics gained their independence and many regions gained autonomous status within Russia. In 1992, Aeroflot was broken up approximately along these lines, with each subsidiary being reformed as an independent company, or a so-called 'Babyflot.' By some estimates, nearly 800 Babyflots were established, with many of the smaller carriers failing almost immediately due to a combination of cash flow problems, aging aircraft, incredibly poor safety records, and lack of consumer demand. However, some of the larger

[130] Thurlow, C. & Jaworski, A. (2003). Communicating a Global Reach: Inflight Magazines As A Globalizing Genre In Tourism, *Journal of Sociolinguistics*, 7:4, 581-608.

subsidiaries were reformed as flag-carrier airlines for newly independent post-Soviet states. Among these were Estonian Air, based in Tallinn, and Latavio Latvian Airlines, based in Riga.

4.3.1 Estonian Air & Nordica

An Estonian national air carrier emerged from the breakup of Aeroflot in 1991, at the same time as Estonian independence was reinstated. It was, of course, necessary to rename the defunct Estonian division of Aeroflot and, consistent with most other 'Babyflots,' a name based on the national (or, in some cases, regional) demonym was selected. Estonian Air served as the national flag carrier from 1991 until 2015 and operated under both state and private sector ownership structures. A controlling stake in Estonian Air was purchased by SAS Scandinavian Airline System in 1996 and was held until 2010 when this stake was reduced to 10% through the injection of additional capital into the airlines by the Estonian Government, which then regained a controlling stake in the carrier. Estonian Air was fraught by significant financial issues between 2009 and 2014. In 2012 it was deemed 'technically bankrupt,' and received a further injection of funds from the Estonian Government in order to continue operations.[131] In 2015 the European Commission determined that these payments constituted state aid in contravention of EU law and ordered the recovery of the amount in question by the Estonian state.[132] This led to the immediate collapse of Estonian Air.

As previously mentioned, the nation branding efforts in Estonia and Latvia can be considered the products of critical junctures at which decisions regarding brand direction were made. These junctures, in this case the collapse of established structures, provided these states with the opportunity and, indeed the necessity, to rapidly establish new structures to take their place. However, the case of Estonian Air demonstrates, these critical junctures did not occur as a single, monolithic change, but may instead be more accurately characterised as a series of smaller sub-junctures flowing from the primary historical event – the collapse of the Soviet Union. Some of these sub-junctures took as long as 25 years to be felt. However, when they did,

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[131] Veebel, V, Ploom, I & Kulu, L (2015) Shortcomings Of The EU State Aid Model From Peripheral Perspective: The Case of Estonian Air, *Baltic Journal of Economics*, 15:1, 50-64.
[132] European Commission (2015), *Final Commission Decision on The Measures sa.35956 (2013/c) (ex 2013/nn) (ex 2012/n)*, Brussels, 6 November, p. 40.

they opened up additional opportunities and platforms for the iteration of a nation branding strategy. As a legacy of Estonia's Soviet history, the branding of Estonian Air was strongly wedded to a vision of the nation as it stood in 199; that is to say, inconsistent with the direction that the broader attempts to brand Estonia had taken in the intervening 25 years prior to its collapse. In its place, a new state-owned airline was established in order to maintain Estonia's international connectivity. This airline, named 'Nordica,' was established on 25 September 2016 by the Estonian Government and began operations on 8 November 2015.

For the first several months of operations the airline was known as Nordic Aviation Group, however in early 2016 it was deemed necessary to establish a brand identity for the new carrier. The airline solicited suggestions from the public before finally deciding on 'Nordica.' In a statement issued in March 2016 by Erik Sakkov, at the time commercial director and a member of the management board of Nordic Aviation Group, he stated that "Estonia has always aligned itself more with Northern Europe than any other region, and that's something the people in charge of our country have wanted to see reflected in the name of the national carrier."[133] Furthermore, he acknowledged the challenge that is faced when seeking to brand into a regional identity in cases where this identity is, to some extent, disputed. Sakkov states that the company was "aware of the fact that there are other companies in the world calling themselves Nordica and that … in many languages the word also has a geographical meaning.'[134]

Fomenko characterises this as a shift within the horizontal dimension of airline naming conventions, from a 'national' paradigm, to a 'regional' paradigm while, at the same time, remaining within the 'territorial' vertical paradigm.[135] Fomenko's framework allows us to extrapolate from this shift in naming conventions into a broader examination of how this change functions within the broader branding strategy of these two states. By adopting names for their national carriers that sit within the regional paradigm, both Estonia and Latvia can be considered to have deemed branding strategies grounded in a regional identity to have greater competitive weight that those oriented at a strictly national level.

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[133] Sakkov, E (2016), *Nordica - The Story Behind The New Name Of The Airline*, 8 March, <https://www.nordica.ee/en/about-the-company/press-centre/nordica-the-story-behind-the-new-name-of-the-airline/>.
[134] Ibid.
[135] Fomenko, O (2012), *Brands In The Air: Nation Branding Through Airlines*, Unpublished Conference Paper, University of Turku,

In the case of Estonia, this shift is realised not only through the textual elements of the Nordica branding process, but through the incorporation of visual elements that break with an established sense of national identity within the branding of Estonia's national carrier. The logo of Estonian Air was the national bird of Estonia, the swallow, stylised as a sweeping blue V-shape on the tailfin of Estonian Air aircraft. However, in branding Nordica, visual symbolism sitting within Fomenko's 'national' paradigm were excluded in favour of symbolism that represented more conceptual qualities. A stylised dragonfly was selected as the motif for Nordica as it was perceived to be "a mystical and beautiful creature that cannot be found everywhere and that looks like a high-tech miracle… In many cultures, the dragonfly is also the symbol of good fortune."[136] However Estonia is not one of the 'many cultures' in which dragonflies are perceived to represent these qualities, and thus we can observe yet another instance in which an extrospective branding approach is favoured over an introspective and endogenous approach to symbol selection.

Picture III: Estonian Air aircraft. Source: G East & H Wright, H, 'Estonian Air Files for Bankruptcy' [137]

[136] Sarapik, A (2016), 'New national airline: from Estonian to Nordic, from national bird to dragonfly,' *ERR*, 12 March, <https://news.err.ee/117811/new-national-airline-from-estonian-to-nordic-from-national-bird-to-dragonfly>.
[137] East, G & Wright, H (2015), 'Estonian Air Files for Bankruptcy,' *Baltic Times*, 18 November, <https://www.baltictimes.com/estonian_air_files_for_bankruptcy_1695302201564ceb58308f4/>.

4.3.2 Latvian Airlines / Latavio & airBaltic

Similarly to Estonian Air, Latvian Airlines emerged as a Babyflot from the breakup of Aeroflot in 1992. It inherited a number of aging Soviet-built aircraft and, similarly to many of the other 800 Babyflots that sprang up around the former Soviet Union, an inefficient management structure and unsustainable business model. In 1992 Latvian Airlines was rebranded as Latavio. Latavio's precarious financial situation was immediately apparent and an attempt in 1995 to privatise the company failed. Latavio was declared bankrupt in October 1995.[138] The government of Latvia sought investors to assist in the establishment of a new national carrier. On 28 August 1995, the Latvian state entered into a joint venture with SAS Scandinavian Airlines (SAS) to establish this new airline, to be named Air Baltic (in 2004 this name was restylised as airBaltic).[139]

By contrast to Nordica, airBaltic has a far longer history and, consequently, far less information is publicly available on how branding decisions were made at the time of the airline's establishment. However, the fact that the airBaltic branding was determined prior to Latvia's formal adoption of a Balto-centric speaks to the sense of continuity with a Soviet and, indeed, pre-Soviet era sense of identity within the Baltic state.

If we consider that the national airlines of most countries are leveraged as a highly effective platform to promote a national brand abroad, airBaltic stands apart as an outlier to this trend as its specific Latvian-ness is sidelined in favour of a promotion of the broader pan-Baltic identity that is only made possible through a realignment of branding strategy away from the national and towards the regional. While this may initially appear a wasted opportunity for the Latvian Government (the majority shareholder of airBaltic, owning approximately 80% of shares in the company) to promote Latvia abroad, the logic becomes more apparently when taken within the broader context of Latvia's pan-Baltic nation branding metanarrative.[140]

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[138] Baltic News Service (2001), 'Šogad plāno pabeigt 'Latavio' likvidāciju,' *Delfi*, 25 May, <https://www.delfi.lv/bizness/biznesa_vide/sogad-plano-pabeigt-latavio-likvidaciju.d?id=1345598>.
[139] airBaltic (2018), *Company History*, <www.airbaltic.com/en/company-history>.
[140] airBaltic, (2018), *Basic Company Information*, <www.airbaltic.com/en/basic-company-information>

Picture IV: airBaltic Airbus A220 aircraft in Estonian flag livery. PlaneSpottingBerlin (2019), 'Air Baltic A220-300 NEW "Estonian Flag" SPECIAL LIVERY Landing and Takeoff at Berlin Tegel | YL-CSJ' [141]

Picture V: airBaltic Airbus A220 aircraft in Lithuanian flag livery. Bokeroncito1983, 'LITHUANIAN FLAG LIVERY Air Baltic Airbus A220-300 YL-CSK Take Off Malaga LEMG' [142]

As we can see in Pictures IV and V, airBaltic has opted to eschew the Latvian flag on several of its aircraft in favour of the flags of its neighbouring countries. The effect of this is, once again, two-fold: to compound the airline's position as a carrier for the entire Baltic region, but also to promote and add credibility to the claims outlined in Latvia's nation branding strategy that Latvia, and Riga more specifically, is the cornerstone of the Baltic states. While not strictly within the domain of nation branding, the development of airBaltic as the flag-carrier of the entire Baltic region, therefore channelling visitors through Riga en route to Estonia or Lithuania, can be considered to be a dual commercial/ soft power project reinforces Latvia's place as the gateway to the Baltics in both a branding and a spatial sense.

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[141] PlaneSpottingBerlin (2019), Air Baltic A220-300 NEW "Estonian Flag" SPECIAL LIVERY Landing and Takeoff at Berlin Tegel | YL-CSJ, *YouTube*, <https://www.youtube.com/watch?v=ShhNhRo1RN0>.
[142] Bokeroncito1983 (2019), LITHUANIAN FLAG LIVERY Air Baltic Airbus A220-300 YL-CSK Take Off Malaga LEMG, *YouTube*, <https://www.youtube.com/watch?v=0freSZ_1v5M>.

To return to Fomenko's model for theorising aviation sector branding as an extension of nation branding, we can see that, as mentioned above, airBaltic's emergence from Latavio and the associated realignment of branding direction represented a shift from the 'national' paradigm, to a 'regional' paradigm while, remaining within the 'territorial' vertical paradigm.[143] However, unlike Nordica, this was incorporated into airBaltic's visual identity through a more comprehensive departure from culturally endogenous elements such as colour choice in favour of branding elements that cannot be considered to connect with any particular components of the national identities of any of the Baltic states, making it more representative of all three.

Picture VI: airBaltic A220 aircraft in standard livery. Source: [144]

Figure VII: airBaltic logo. Source: airBaltic (2020), *airBaltic Logo* [145]

As seen in in Picture VI and Figure VII, a navy blue and lime green colour palette is consistent across airBaltic's visual branding, both on its aircraft and in media such as its website. However this choice of colour palette finds no direct source material in the national flags of any of the Baltic states and is, in fact, so strikingly removed from any national symbolism that a reasonable observer may conclude that this branding direction was formulated in this way in order to project

[143] Fomenko, *Brands In The Air*.
[144] Ranta, A (2019) *airBaltic's Airbus A220-200*, in AeroNewsX, <https://www.aeronewsx.com/post/airbaltic-approves-new-business-plan>.
[145] airBaltic (2020), *airBaltic Logo,* <https://www.airbaltic.com/en/logo>.

Balticness as an identity marker operating on a different level of identity that that of the national identities of the three Baltic states.

Chapter V: Conclusions

When formulating their nation brands during their periods of transition following the collapse of the Soviet Union, Estonia and Latvia opted for different paths with relation to their incorporation of a Baltic identity into these strategies. While their modern history may have followed a similar trajectory, the way this is reflected in their branding strategies has been demonstrated to have shown a significant divergence in this regard. The reasons for this are manifold and intersectional and are underpinned by a range of factors grounded in both historical processes and contemporary nation branding practices.

5.1 Endogenous Cultural Factors

The importance of endogenous cultural factors in determining the nation branding strategies of Estonia and Latvia should not be understated. As Lagerspetz notes, Estonia and Lithuania share many commonalities, both with each other and with their neighbours across the Nordic region and, as with all branding strategies, these qualities constitute some of the raw materials that form the basis of the brand.[146] However each country also brings to its brand a set of beliefs, perceptions, and identity markers drawn from within its own culture and history that make certain branding pathways more or less palatable to a domestic audience. Anholt states that winning the support of the domestic audience is important for the success of a nation brand as it improves the likelihood of the brand being taken up outside of the government sphere by the private sector and civil society. The boundaries dictated to nation branding professionals by domestic public opinion in Estonia and Latvia have been dealt with in previous chapters, and largely concern themselves with how the people of those countries perceive themselves and their place in the world. However their perceptions of themselves just as often incorporate a relational dimension derived from how their perceive themselves

[146] Lagerspetz, M. (2003). How Many Nordic Countries?: Possibilities and Limits of Geopolitical Identity Construction. *Cooperation and Conflict*, 38:1, 51.

5.2 Authorship

A crucial reason that Estonia and Latvia emerged from their transition period with such divergent strategies is likely due, at least in part, to the authorship of their strategies. Due to budgetary constraints, Latvia was unable to procure a nation branding team that was professionalised to the same extent as Estonia's, and the team that they did emerge with did not possess a comparable level of cultural and historical insight into their target country. Consequently, Latvia's strategy adheres more closely to a conventional model of nation branding, rather than one that has been formulated specifically to meet the needs of a transitional country. As established in Chapter III, the objectives and aspirations of transitional countries in building a more competitive identity in the global marketplace are often very different to those associated with developed, post-industrial economies. The Latvian strategy was developed by a team of researchers who, based on the brand document that emerged from this initiative, had no prior experience with professional nation branding practice and who, according to the references list of the aforementioned document, did not consult any sources in preparing the strategy that dealt with the particular challenges inherent in branding a country in transition. Most of the source material used in the preparation of the Latvian strategy draws from a pool of nation branding literature that is highly normative in its treatment of nation branding as a practice that is undertaken either by countries that are already highly developed, or those that may be considered underdeveloped by current standards. However, the specific set of circumstances surrounding the collapse of communism in Central and Eastern Europe produced an historical juncture which is accounted for in the Estonian strategy through the incorporation of a critical examination of a legacy regional identity, but not in the case of Latvia. While those responsible for 'introducing' Estonia following its renewed independence took a critically reflexive approach to assessing possible pathways for regional identity construction, the team responsible for the Latvian brand instead asked what Latvia is, rather than what Latvia could be. This is seemingly at odds with Anholt's assertion that nation brand identities but be grounded in the lived reality of the country being branded and cannot simply be confected out of thin air in order to impose an identity on the country that is inconsistent with its endogenous.[147] However, as stated above, the unique set

[147] Simon Anholt, 2011. "Beyond the Nation Brand: The Role of Image and Identity in International Relations," Chapters, in: Andy Pike (ed.), *Brands and Branding Geographies*, Edward Elgar Publishing,

of historical circumstances arising from the collapse of the Soviet Union offered the requisite disruption of inherited identities that gave nation branding practitioners in Estonia and Latvia greater freedom to construct their nation brands within a framework of more aspiration regionalism than would otherwise have been possible.

5.3 Credibility

As mentioned above, the role of credibility in shaping a nation brand identity has been explored to a limited extent in the nation branding literature. While there exists no firm measure for how far the boundaries of credibility can be pushed by those tasked with branding nations, the prevailing wisdom on the subject favours an approach that paints countries' existing identities in a more favourable light, rather than projecting entirely new identities. The fear, as stated by Anholt, is that the market may reject these identities as lacking credibility and that the branded nation would appear "sadly quixotic" in the eyes of consumers.[148] However credibility, as a positive quality attributed to brands, is fundamentally premised on preconceptions possessed by the consumer about the relationship between a product and the claims made about that product within the framework of a branding or marketing strategy. This is yet another example of the additional freedoms afforded to those entrusted with introducing Estonia and Latvia to the world following the collapse of the Soviet Union. With limited preconceptions about their national identities and their national character as independent states, Estonia and Latvia were afforded greater licence to project more aspirational qualities into the international marketplace as a result of the perception deficit arising from the uncertainty around their independence.

However, this is not to suggest that they had carte blanche to design a competitive identity entirely detached from their lived realities; there are a number of unshakeable truths inherent in every national identity that must be accounted for. The question remains as to whether these differences in Estonian and Latvian endogenous national identity are, in and of themselves, enough to dictate the entire direction of a nation branding project. Do refer once

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pp. 11-12.

[148] Fan, Y (2006), Branding the nation: what is being branded?' *Journal of Vacation Marketing,* 12:1, pp. 5-14.

again to Lagerspetz, it is unlikely, for example, that the differences between a Finno-Ugric and a Baltic language are adequate grounds to disqualify a nation from claiming a Nordic regional identity, particularly as neither language group is particularly widely represented in the Nordic region. It is also unlikely that a marginally less pervasive spread of Lutheranism is enough to discourage the international consumer base from discounting Latvia as having legitimate access to a Nordic identity. Far more likely, however, is that those responsible for introducing Latvia as an independent state saw competitive value in being the only Baltic state willing to lay claim to Balticness as a dimension of a competitive identity.

5.4 Competition & Differentiation

As discussed previously, we have seen a shift in the nation branding literature in terms of how we discuss the interactional dimension of nation branding. While initially the discourse around this practice emphasised the promotion of the country in terms of improving its image in the hope of increasing consumption of its goods and services abroad, increasing its desirability as a destination for tourism and foreign direct investment, and to boost its diplomatic standing, the shift marked by Anholt's assertion that we should instead think of nation branding as the construction of a 'competitive identity' reimagines the practice as an inter-national, interactional practice that more closely aligns with a neoliberal understanding of competition. This is to say that nations seeking to construct their brands are now compelled to do so in a way that assesses and evaluates competition from other countries and encourages 'identity monopolies;' that is to say that neighbouring countries are dissuaded from adopting similar or overlapping competitive identities. Latvia's first attempt at nation branding came a short time after Estonia had launched its own strategy, and the documents produced by Latvia to outline their proposed are interspersed with a critical examination of Estonia's nation branding alongside a number of recommendations for ways in which Latvia can differentiate itself from both its Baltic neighbours and other European countries pending its accession to the European Union. To this end it is perhaps fortunate for Latvia that Estonia opted to pursue a Nordic pathway, as this allowed both countries to stake out unique territory for their brands in the global marketplace of nations without encroaching on the other. In this sense we can theorise the fractured regionalisms generated by

the variations in nation branding of the Baltic states as the equivalent of an imperfect competition scenario as it would be characterised in the broader economy. By assuming the identities of divergent regionalisms, Estonia and Latvia are, in effect, segmenting the market by offering heterogenous and highly differentiated products to consumers.[149] A conscious decision to segment the market on the part of the Latvian branding authorities would require an acknowledgement by that group that adequate demand exists within the international market for Balticness, and a nation that fully embodies that identity. While in the Estonian brand strategy there is no mention of differentiation, the Latvian strategy mentions the desire to differentiate its product nine times. The execution of this recommendation marks an attempt at heterogenisation of the product offering within the Baltic space.

Ultimately, divergences in approach to the incorporation of regional identity in these cases arise from the need for nation branding professionals to strike a balance between maximising competitiveness in relation to other, comparable national products which they are likely to compete in the global marketplace of nations, while also taking into account the need to meet community standards with regards to representation of culture and identity.

5.5 Further Research

While the Estonian and Latvia cases represent a specific and acutely linear comparative case study through which we can observe the incorporation of regional identities into the nation branding strategies of states in transition, further research is required in order to evaluate the transferability of this methodology to other comparable regions. These may include other groupings of former Soviet states such as those Central Asian countries often colloquially referred to as The Five 'Stans',[150] or the countries of the Former Yugoslavia. At time of writing the practice of nation branding has not been widely or consistently adopted within these regions and, consequently, it is challenging to extrapolate from the Baltics into these other regions to

[149] Smith, WR (1956), Product Differentiation and Market Segmentation as Alternative Marketing Strategies. *Journal of Marketing,* vol. 21, no. 1, pp. 3–8.

[150] This label is often used to group Uzbekistan, Turkmenistan, Tajikistan, Kazakhstan, and Kyrgyzstan due to the common -stan suffix in their English names; U Azizov, *Freeing from the "Territorial Trap": Re-reading the Five Stans Central Asian Spatial Discourse*, LIT Verlag, Münster, 2015.

assess the applicability of this methodology more widely. However, a limited number of states, notably Kazakhstan, have begun to place greater emphasis on international perception and public diplomacy, and have stated their intention to launch fully realised nation brands in the near future.

For the purposes of this paper, Lithuania was excluded from the analysis as the several aborted attempts it has made at developing a nation brand were not deemed to constitute an adequately substantial body of material from which reliable data could be obtained. As its previous attempts at nation branding were either limited by sector, such as tourism or exports, they did not meet the criteria for inclusion as outlined in the project scope. However, should Lithuania revisit the need to develop its nation brand further and succeed in launching an initiative on the scale of Estonia and Latvia, further research could be done to examine how discourses of competitiveness of a Baltic identity are treated in the Lithuanian case over time. In its previous attempts, Lithuania has demonstrated a similar inclination to Estonia, sidelining a Baltic identity in favour of branding that highlighted its historical membership of the Polish-Lithuanian Commonwealth as a key identity marker.[151]

[151] E Berg, 'Where East Meets West: Baltic States in Search of New Identity', in E Berg (ed.), *Regions in Central and Eastern Europe: Past and Presenti,* Slavic Research Centre, Hokkaido, 2007, pp. 49-67.

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