



A Successful Example of Complex Country Branding: The ‘E-Estonia’ Positioning Concept and Its Relation to the Presidency of the Council of the EU¹

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Abstract. Estonia held the presidency of the Council of the European Union for six months from 1 July to 31 December 2017. This was a great opportunity to strengthen and shape the country image, also known as the country brand. They do have something to build on: there have been very few countries in recent years and decades where country branding was so conscious. It was a brave choice: in the early 2000s, they decided that they would become E-Estonia. This is not just a means to communicate but also involves policies and tangible developments regarding electronics, IT, and brand new technologies in order to build the most advanced digital society of Europe and the world. But how did this appear during the EU Presidency and how are Estonian citizens involved in branding? This rather lengthy case study explores the concept as a good practice, also setting an example for other countries.

Keywords: country brand, positioning, e-government, Estonia, case study

1. Introduction: The Significance of Country Branding

In the past two decades, country image centres and country brand councils have been created in Europe and all over the world. Their task is the same everywhere: to position the country, distinguish it from ‘competitors’, create a uniform brand strategy, and, in a sense, coordinate the various messages about the country.

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Several sources state that Simon Anholt was the first one who put **the concepts of ‘nation branding’ and ‘country branding’ on paper in 1996**, when, according to his own account, he was getting bored with spending his life making already rich companies a little bit richer (Anholt 2011, Feinberg–Zhao 2011, Subramanian 2017, Rendon 2003). Therefore, Anholt, having been engaged in the marketing of multinational companies (e.g. Coca-Cola or Nescafé), decided to start a completely new venture: to specialize in country branding.

It does not mean that the theory or practice of country branding had been an overlooked topic before 1996, but its name was different at the time. In 1993, a textbook on **place marketing** was published, which also dealt with countries: ‘Marketing Places: Attracting Investment, Industry, and Tourism to Cities, States and Nations’, whose most important author was no one else than Philip Kotler, ‘the Pope of Marketing’.

However, if we take a **broader perspective, national identity** had always been mentioned in political geography, international relations, political science, cultural anthropology, social psychology, political philosophy, international law, sociology, and historical science (Treanor 1997; Dinnie 2002, 2008). Rather interestingly, marketing academics had not devoted their attention to country brands but to brands from specific countries, that is, the **‘country of origin effect’**. For example, Papadopoulos and Heslop (2002) counted 766 significant CoO-effect publications from the previous 50 years but also pointed out that there had not been appropriate surveys on the image of individual countries.

The great breakthrough was achieved by the ‘Journal of Brand Management’, which devoted a special issue to ‘nation branding’ in 2002 (see Anholt 2002) with the publications of renowned authors such as Philip Kotler, David Gertner, Nicolas Papadopoulos, Louise Heslop, Wally Olins, Fiona Gilmore, and Creenagh Lodge. In November 2004, a separate **academic journal named ‘Place Branding’** was launched – today, it is called **‘Place Branding and Public Diplomacy’**. Several books followed: Simon Anholt wrote three books, ‘Brand New Justice’ (2005), ‘Competitive Identity’ (2007), and ‘Brand America’ (2004) co-written with Jeremy Hildreth. In 2008, a more ‘academic’ book was published, titled ‘Nation Branding’ and edited by Keith Dinnie. The field has also developed dynamically ever since, and books focusing on Central and Eastern Europe have also been published, for example ‘Branding Post-Communist Nations: Marketizing National Identities in the “New” Europe’ edited by Nadia Kaneva (2014).

Going back to a basic question: **Why do we need country branding or nation branding anyway?** Mostly because:

Nowadays nations are in fierce competition with each other in several fields, including investments, export, and tourism. This is a new phenomenon. In the course of history, tourism has not been of great importance, investments

have been limited to a relative narrow range of companies, and the export has covered generally only those national products which have been transported for a long time to the traditionally formed markets. Globalisation has reshaped the rules of the game here as well – Olins says (2004: 176)

Yes, the struggle of countries is much more multifaceted than it was about 100 years ago. Meanwhile, **the number of countries significantly increased**, and – from an economic point of view – we can say that an increasing number of competitors appeared in the market. While the United Nations had 51 member states in 1945, their number is 193 today (<http://www.un.org/en/sections/about-un/overview/index.html> 2018).

If we do not only mention the increase in the number of countries but also consider that:

- democracy is gaining ground worldwide, which makes the work of governments more transparent;
- the role of international media is increasing, which also increases transparency: people are better-informed than ever;
- travel costs are decreasing, while purchasing power is increasing;
- investment in other countries is becoming easier, and several activities can be ‘outsourced’;
- specific products may come from any country worldwide;
- the demand for ‘brains’, the most qualified workforce, is increasing; moreover, countries are also competing for students;
- certain international organizations provide resources for states that are in need and ‘lobby’ appropriately;
- mass media, telecommunications, and Internet created the global village: we may receive a lot of information about a place immediately with a Google search;
- therefore, borders disappear in a sense; the expressions ‘foreign country’ and ‘foreigner’ lose their meaning; everything is like visiting our neighbours in the neighbourhood, then it becomes clear that **this is a new world** (Papp-Váry 2009).

We can also say that there is a new era in the competition of nations. Although military clashes are still common in certain regions of the world, in most places, warfare is not carried on through traditional weapons but tools of marketing (van Ham 2002). **The battlefield is** nothing else than **the mind of consumers** (Ries–Trout 1997).

This is the scene where each country tries to gain dominance and occupy as much area as possible because **this means tourists, investors, and more consumers purchasing the products of the country**. Following Professor Nye (2003, 2005), Anholt and Hildreth (2004), Plavsak (2004), Vicente (2004), and Anholt (2005) call countries with a brand a ‘**soft power**’ as opposed to the previously established, revulsive ‘hard power’, which is based on authority, military, and violence.

Therefore, it is no accident that **countries take over well-established global corporate strategies**, because 51 of the 100 strongest economies in the world are not countries but companies (Lindsay 2000, Wint–Wells 2000, Kyriacou–Cromwell 2001, Gilmore 2002). This is why they start to use country marketing and country branding.

2. Dimensions of Country Brands

One of the difficulties of country branding is that country brands themselves are much more complicated than traditional product or service brands and involve much more dimensions (Kádár 2013, Benedek 2016). Several approaches have been developed to model this, and the most important one of these is **the Nation Brand Hexagon concept** and the related Nation Brands Index by Simon Anholt (Anholt-GfK Roper 2016, Anholt-Ipsos Nation Brands Index 2018).

The Nation Brand Index measures the power and appeal of each country's 'brand image' by examining six dimensions of national competence. Together, these dimensions make up the Nation Brand Hexagon:

- **Exports:** The 'country of origin effect' – whether knowing where the product is made increases or decreases people's likelihood of purchasing it, whether a country has particular strengths in science and technology and whether it has creative energy. Perceived associations with particular industries round out that country's image in this space.

- **Governance:** Incorporates the perceived competence and honesty of the government, respect for citizens' rights and fair treatment as well as global behaviour in the areas of international peace and security, environmental protection and world poverty reduction. Respondents also select one adjective that best describes the government in each country.

- **Culture:** Perceptions of a country's heritage, its contemporary cultural 'vibes' from music, films, art and literature as well as excellence in sports. Various cultural activities are presented to gauge their strongest images of a country's cultural 'product'.

- **People:** The general assessment of people's friendliness measured by whether respondents would feel welcome when visiting the country. Additionally, the appeal of the people on a personal level – whether respondents want to have a close friend from that country – as well as human resources on a professional level, that is, how willing respondents would be to hire a well-qualified person from that country. Respondents select adjectives describing the predominant images they have of the people in each country.

- **Tourism:** Tourism appeal in three major areas: natural beauty, historic buildings and monuments, and vibrant city life and urban attractions. Tourism

potential: how likely they would visit a country if money is no object and adjectives representing the likely experience.

– **Immigration and Investment:** A country’s power to attract talent and capital measured not only by whether people would consider studying, working, and living in that country but also by the country’s economic prosperity, equal opportunity, and ultimately the perception that it is a place with a high quality of life. The country’s economic and business conditions – whether stagnant, declining, developing, or forward-thinking.

Table 1. *Dimensions of country brands and their measurement based on Simon Anholt’s ‘Nation Brand Hexagon’ model and ‘Nation Brand Index’ ranking*

Exports
Science and Technology
Buy products
Creative Place
Governance
Competent and Honest
Rights and Fairness
Peace and Security
Environment
Poverty
Culture
Sport
Cultural Heritage
Contemporary Culture
People
Welcoming
Close friend
Employability
Tourism
Visit if Money were No Object
Natural Beauty
Historic Buildings
Vibrant City
Immigration and Investment
Work and Live
Quality of Life
Educational Qualifications
Invest in Business
Equality in Society

Source: Anholt-GfK Roper Nation Brands Index 2016, Anholt-Ipsos Nation Brands Index 2018

One of the greatest questions of country branding is if a specific country can **find a central idea that can be used to distinguish itself or, in a marketing sense, if it can position itself** in a way that it does not only affect one dimension from the list above but all of them.

This is also a challenge because in most countries different organizations are responsible for each item: for example, the tourism agency of a specific country is responsible for the encouragement of tourism, ministries and cultural institutes are responsible for culture, investments are fostered by an investment promotion organization, export is managed by yet another apparatus, and governance is run by the government or the leader of the country. In several cases, the activities of specific organizations and their communications are not coordinated, thus weakening the uniform country image and the activity shaping it, a.k.a. country branding.

This is why **various kinds of country image centres and country brand councils have been created in many countries** in Europe and all over the world in the past two decades. However, **most of these efforts to create coordinating bodies have proved unsuccessful** because they could not find a real, unique distinguishing position or were not brave enough to follow the path they had chosen in the long run. Branding is not only about communications but also about actions and, in the case of country branding, about a national strategy behind these actions, a political concept (of foreign and internal policy) in a broad sense.

3. Positioning: How Can We Distinguish Our Country?

Positioning is perhaps the most frequently mentioned idea in connection with branding, and its point is to define in what way the brand is unique among others. Many people think that this means a definition of qualities different from rivals, but the real aim of positioning is to create a situation where the brand has no rival, it is the ‘only one’ – as the relevant chapter of the book *A márkanev ereje* (“The Power of Brand Names”) points out (Papp-Váry 2013).

In order to achieve this, brands must affect the ideas in consumers’ minds first. As the subtitle of the book ‘Positioning’ by Ries and Trout says, it is **‘The Battle for Your Mind’**. Ries and Trout explained significant ideas such as (1997: 29.): ‘To succeed in our over-communicated society, a company must create a “position” in the prospect’s mind. A position that takes into consideration not only its own strength and weaknesses, but those of its competitors as well.’

The adaptation of this idea for places and, in this case, countries, means that **positioning greatly depends on the following aspects:**

- 1) What is the strength or what are the strengths of the specific country?
- 2) What do ‘customers’ need? What is the sensible advantage for tourists, investors, and other stakeholders – including locals?

3) What is the positioning of competitors, that is, other countries? What do they communicate as their competitive advantage? (Our country must be different or, at least, say something different.)

4) What macrotrends can be seen and which are the ones that define what is required for success in the upcoming years or decades?

Good positioning can be characterized by the following attributes (Papp-Váry 2011):

1) It **distinguishes**: Many countries fall in the trap that they look at what others do and copy them. This is the so-called 'me too' way of thinking, although one has to be different: this is the way a country can become a focus of attention, increase the number of tourists and investors, raise media interest, and feed the pride of local people. Countries must find some unique and specific attraction that other countries do not have or at least do not communicate. Research has proved that several thousands of messages are received by an average person in our overcommunicated society every day; so, there is no chance to stand out if you are not original.

2) It is **relevant**: That is, it is interesting for people – tourists, investors, and locals. Well-defined positioning also helps to communicate and clarify the aims and efforts of the state.

3) It is **true**: There must be facts behind positioning, and they must be based on existing capabilities and values agreed on by the majority of the country's citizens. If we say something that is not true, it will kick back because, as the famous advertising guru, Bill Bernbach, said: 'nothing kills a bad product faster than good advertising' (Levenson 1998). There must not be a gap between promise and experience, and communications must not divorce from reality. At the same time, you also have to use it as smartly as possible. As the slogan of the McCann-Erickson advertising agency says, 'Truth well told'. This must be our guideline.

4) It is **concrete**: The definition of a specific example of positioning always involves some kind of narrowing: we must choose a specific thing, be the best in that field, and communicate it. In the long run, less is more.

5) It is **motivating**: It affects the mind and the heart at the same time, creates positive emotions, and people want to be involved in it. Therefore, logic and creativity are equally necessary to find it.

6) It is **strategic**: It is something that may affect the operation of the whole country, not just its communication. It can be adopted to each function of a country. It shows the way for the country in the long run. It may also appear consistently on each tool.

7) It is **restrictive**: Positioning is always restriction. We must define what the specific country is, and what it is not. We should say less, and it should be short and simple.

8) It is an **experience**. Something that makes us feel: Wow! Yeah! Haha! (Sas 2018)

The process of positioning is actually very similar to Michelangelo's words on his own statues, stating that he just quarried the stone and realized what had always been included in it. Therefore, we are often surprised to see an example of good positioning: 'Why didn't we think of that before?'

Countries can be positioned or distinguished from various aspects, including:

- characteristic architecture;
- unique sights;
- natural environment;
- weather, climate;
- history;
- legend, myth;
- location;
- culture;
- event;
- national cuisine, food;
- wine or other alcoholic beverages;
- people;
- celebrities;
- night life;
- sport;
- scientific achievement;
- design;
- industry, characteristic products, etc.

As it can be seen, most of these are related to the touristic sights of the country. However, **tourism is not the only thing that can serve as the basis for country positioning.**

The most important point is that positioning should be as specific as possible, something that 'competitor' countries do not mention in their self-descriptions, and use an argument that is important for the 'customers': the stakeholders of the country. In connection with the previous chapter, we may also mention that the more of these six nation brand aspects are covered by positioning in a specific case, the more effective it can be.

According to the famous American brand expert, Jack Trout (2004), **marketing is nothing else than a 'coherent strategic direction'**. If the positioning is good, then all middle-term and long-term plans must follow from it logically.

4. Unique Country Positioning: Estonia Having Become 'E-Stonia'

Let us see the case of Estonia in the light of the abovementioned theoretical approach. Estonia is **one of the smallest countries in the world** and Europe considering its territory, although it is not as small as many people would think: its area of 45,226 km² is bigger than Slovenia, the Netherlands, Denmark, or Switzerland. At the same time, its population is only 1.3 million in total, wherefore its population density is 4 times smaller than the average of the European Union. It is also important to note that although the territory has a long historical past, independent Estonia was born only at the end of World War I: **in 2018, Estonia celebrates the 100th anniversary** of the declaration of its independence, just like Finland. However, the country has spent almost half of its hundred years under Soviet occupation, as part of the Soviet Union. One result of that is the fact that about 25% of the population is Russian.

Given the above, it is not surprising that the country had to face challenges that were similar to those experienced in other Baltic states.

As the head of the country image centre of Latvia, a neighbouring country, Ojars Kalnins explained (see Papp-Váry 2005) that the **country branding process had three stages** in the case of Baltic states. In the early 1990s, they had to be introduced to the world: 'we are here'. Then they had to demonstrate that their nation is just as normal as others: 'we are normal'. In the case of Estonia, this also meant that they suggested they were the 'top students' of the European Union. The third phase could only take place when they were already discussing what characteristics distinguished the country from others. This was (and is) the era of 'we are special'.

Table 2. *The three phases of country branding in the case of the Baltic States after the collapse of the Soviet Union*

Phase	Message	Meaning	Period
1	'We are here!'	'Introduction' to Europe and the world	Right after the collapse of socialism, reclaiming independence/democracy
2	'We are normal!'	The nation is just as normal as other nations	Before joining the European Union and other international institutions such as NATO
3	'We are special!'	Unique positioning of the country	After joining the European Union

Source: based on Papp-Váry 2005: 8–11

In the case of Estonia, the first significant brand-building steps were taken in 2001, when an Estonian participant won the **Eurovision Song Contest**, and Estonia became the host country in the next year. Estonia was the first former Soviet member state to organize the Eurovision contest, and its significance is well demonstrated by the fact that it became the topic of PhD theses, and a book was also published about it with the title ‘The Modern Fairy Tale: Nation Branding, National Identity and the Eurovision Song Contest in Estonia’ (Jordan 2014).

In connection with the Eurovision Song Contest, the Estonian organization promoting investments, called Enterprise Estonia, published a **tender, which was won by British consulting company Interbrand**. Regarding the aims (and effects) of organizing the Eurovision Song Contest, the tender material of the company emphasized that their aim was to help Estonia overcome the ‘accident of history’ that had placed the country in the East, rather than the West in the minds of its interlocutors.

However, Interbrand’s task was far more than country branding in connection with the song contest. The aim was to create a complex branding programme that would promote investments, attract tourists, and stimulate export. The programme was also supposed to be connected to their accession to NATO and the EU. In the framework of the project, they conducted extensive research involving 1,400 interviews. Their findings served as the basis of their brand essence, a pure and unifying idea intended to rally Estonian citizens to its cause and convey a **coherent, consistent, and controlled message abroad** (Aronczyk 2013).

The brand essence selected was ‘Positively Transforming’, a phrase that straddled both the recovery of a buried past and the adoption of transition reforms. As the brand book created by Interbrand pointed out, this can be explained with five narratives:

- *Fresh Perspective;*
- *Radical, Reforming, and Transforming Attitude;*
- *Nordic Temperament and Environment;*
- *Resourceful Self-Starter by Nature;*
- *European Society.*

It is peculiar that although the country slogan was also ‘Positively Transforming’, **the logo featured ‘Welcome to Estonia’**, which is, to be honest, less distinguishing. This might have been the reason of a controversy: while the client (Enterprise Estonia), the government, and – not surprisingly – Interbrand, the consulting company itself, considered the project as highly successful, the media and the majority of the citizens asked: ‘Did they spend our money on this?’ They received especially negative feedback regarding the choice of the consulting company: why was a British firm selected instead of an Estonian one? Therefore, the campaign ended as quickly as it started, which may also be attributed to the fact that there was a change of government in 2002.

However, it can be considered a successful effort that some of the narratives mentioned above have 'gone through', especially '**A European Society symbolizing the 'return' to Europe and separation from the former Soviet Union**', and 'A Nordic Temperament and Environment', which played a similar role. The success of these two narratives may also be attributed to the fact that Estonia's leading politicians, Prime Minister Mart Laar and President of the Republic Lennart Meri had been emphasizing those ideas for several years.

The creative elaboration of northern-ness appeared in the Interbrand material as '**Nordic with a twist**', but Estonian companies and citizens started to think (and feel) of themselves more Northern than Baltic without any twist (Jordan 2014). This was all very similar to events that took place in Finland several decades ago: originally, the area was also considered a Baltic country in geography books but was repositioned as part of Scandinavia, not the Baltics (see the 2004 study by Papp-Váry on the case of Finland).

5. The E-stonia Vision Becoming a Mission

Interestingly, the starting point of the latter stage in Estonia was a discussion of a possibility to **change the name of the country**. What happened in 1994 was that a ferry named Estonia sank on the way between the Estonian capital, Tallinn, and the Swedish capital, Stockholm. The tragedy claimed the lives of 852 people, and there are still several conflicting stories on the sinking of the ferry to its watery grave. Some say that it was a revenge of the soldiers of the former Soviet 'empire', who had to leave Estonia forever in 1994, and therefore they placed explosives on the ship. A film starring Donald Sutherland was also produced on the story later on – it was titled 'Estonia' (aired in some countries with the title 'Baltic storm'). As a result of the occurring events, Estonian leaders were seriously considering to replace the name Estonia with **Estland**, hoping that foreigners would not associate this German-sounding name with the ferry accident and at the same time aiming to bring the country closer to the similar sounding Finland (Papp-Váry 2016, Szondi 2007).

Then the 'Baltic storm' subsided, and the name Estonia remained. At least for a while. In the early 2000s, another idea to change the name of the country arose: Estonia should become **E-stonia**! The starting point was that the government realized that Estonia only had forests, timber industry, and some machinery industry, but the latter was not too competitive. Therefore, they defined new areas including electronics and information technology as the possible way out.

Although the name of the country was left unchanged again, **E-stonia became an existing vision that could be translated into concrete actions and communication.**

They even found its historical roots and ideology: Estonia was the first place in the Soviet Union where computer education was started in 1965 (!), using the famous Ural-1 model. Another reference is that most Western countries provided support for Estonia by donating computers after the restoration of independence in 1991, which were then used by Estonians with great enthusiasm (Bucsky 2016).

As a result, all classrooms in the country had been equipped with computers by 1997, and all of them had had Internet access by 1998 (!). The country's first mobile network with data traffic was launched in 2001, which provided wireless Internet access all around the country, including not too densely populated areas such as forests. By 2011, 2,440 free Wi-Fi hotspots had been created nationwide, including cafés, hotels, schools, and petrol stations (Kovács 2017).

Another important factor in the **quick spread of computerization** was that paper-based bureaucracy had not been built up before because Estonia was just 'too small' for this within the Soviet Union. Therefore, they did not have to replace something in the nineties but build and launch something new. This was especially true for the bank system, which they had to build up from scratch – they launched a system with state-of-the-art IT technology. This attitude is also characteristic of their government: since 2000, they have not actually used paper in the sessions of the government and the parliament. Moreover, the right to Internet access was also included in their constitution (!) as a significant channel of democracy (Torontáli 2016). In that sense, the Estonian digital revolution is **not only about technology but also about the creation of a citizen-friendly, service-providing state**, local authorities say. "It is about a state philosophy which probably had not been realized in any countries in such depth" (Kovács 2017).

Toomas Hendrik Ilves, who was President of the Republic of Estonia for a decade (2006–2016), recalled the period the following way: 'Mosaic (the first popular web browser) was published in 1993, and everyone felt like being on a playground. We thought that state administration should also work in a similar way' (Kovács 2017).

The system is based on a chip card and a digital personal document system, which was greatly admired by people from foreign governments following its launch in 2002.

ID-kaart is compulsory for all citizens above the age of 15. It functions as an identity card, an address card, a passport within the EU, a health insurance card, a tax card, an identifier for bank transactions, a digital signature, a ticket/pass in Tallinn and Tartu, and a parking ticket but also provides access to government databases and allows citizens to buy prescription drugs – all at the same time (Torontáli 2016). As a result, citizens need to provide each data only once. For example, if someone takes out an insurance for his/her new car, there is no need to provide any personal data that has been provided somewhere before; the new owner only needs to make a declaration about possessing the new car (Kovács 2017).

We may also ask how many people use the system. A suggestive number could provide an answer: in the 2015 parliamentary elections, more than 30% of votes were cast online from 116 various countries. In Estonia, citizens have been able to cast their vote for the self-government elections since 2005 and for the parliamentary elections since 2007.

Other indicative data prove that filling in tax returns only takes 3–5 minutes with the system, but there are also quick formulas that enable citizens to perform this in 1 (!) minute because they only need to check the numbers provided by the system. It is no wonder that 95% of Estonians fill in their tax returns online.

The **eesti.ee** government portal, launched in 2003, allows citizens to manage more than 160 kinds of their affairs. These are all matters that should also be managed online in other Central and Eastern European countries. For example, citizens can apply online for child care benefit, unemployment benefit, or other social benefits by the state – they do not have to gather information or statements registered by the state again or visit government offices for this reason.

E-healthcare may be the most outstanding point of the novel system, and there are opinions that it is the best e-healthcare system of the world. Doctors see the whole patient journey including all prescribed drugs and performed examinations, and they also have access to X-ray, lab tests, MRI data and images. Patients may also authorize their relatives to access some of their personal information. Due to the sensitive nature of patient information, they log everything in the system, and there is a strict monitoring of permissions to access these data. Patients may consult doctors and make appointments via e-mail, telephone, or Skype (!). Another useful feature is the digital medicine system: there are no prescriptions, and citizens can get their medicines in the drugstores with their ID card. They can also request their regularly used medicines via e-mail, and they do not have to visit their doctors for this purpose (Bucsky 2016).

In the meantime, important international organizations also created their centres of digital operations in Estonia: the NATO Cooperative Cyber Defence Centre of Excellence was established in Tallinn in 2008. It also had an important message because there was a cyber attack against Estonia a year earlier, in April 2007, following the removal of the Soviet war memorial in Tallinn. It involved the parliament, government agencies, ministries, banks, phone companies, and media firms as well. Although it had never been proved, they suspected that Russia was behind the attacks according to the selection of targets and the coordination of the activities. Therefore, Estonia decided that it would create **the world's first 'information embassy'** in Luxemburg. It is actually a huge warehouse, where all important data related to Estonia are stored, to make the restoration of servers possible without data loss should another attack occur (Kovács 2017).

In addition, the headquarters of the IT Agency of the EU responsible for the coordination of various IT developments within the Union was built in

Estonia in 2011. Two years later, the UNESCO World Summit on Information Society honoured the Estonian e-Annual Reporting system as the decade's best e-Government application – among other things, the system provides assistance for the start of businesses. In Estonia, the documentation of the latter can be completed in 18 (!) minutes (Századvég Alapítvány 2015).

As the official presentations about the country point out, there are actually only three things that you cannot manage fully electronically: the sale and purchase of properties, marriage, and divorce (<https://brand.estonia.ee/> 2017).

Others state that as a result of the developments of **electronic state administration**, the Estonian state reached as far that it could practically govern the country from the other side of the world. Taavi Roives, who occupied the prime minister's chair in 2014 at the age of 35, even made jokes that he could only recall one occasion when he had to sign something physically during his two and a half years in office, and it was a guestbook of a ceremony that they put in front of him. According to another interesting piece of information, the online availability of 99% of services in the state with a population of 1.3 million spares a quantity of paper that would amount to the size of 12 Eiffel Towers. According to the statistics, it can also be stated that the use of electronic signature in Estonia spares a sum equal to the 2% of the country's GDP (Kovács 2017).

In summary, there is no doubt that Estonia is building **the most digitally advanced society in the world**. Kersti Kaljulaid, the current President of Estonia always mentions that it has been the definite purpose of her and her predecessors to increase the competitiveness of their country and create an environment for their citizens that would provide them satisfaction and a vision. However, considering their capabilities, they did not just want to develop state-of-the-art technologies; rather, they wished to organize existing solutions into a system that would lead to the best results. This meant that **these new technologies would become available not only for the chosen or the wealthy few but the entire Estonian society**. It is also important to point out that no one in Estonia is forced to become a 'digital citizen', but its advantages are so obvious and tangible that people enter the system willingly and voluntarily (Dajkó 2017a).

6. Digital Start-Ups and Digital Citizenship

As a result, it is no wonder that Estonia is a 'start-up nation', especially regarding the number of new enterprises in correlation with the population, 1.3 million people. This is also supported by the fact that Estonian children may study programming from the age of 7. All this is part of the so-called Tiigrihüpe (Tiger Leap) programme. 'In the 1980s all secondary school students wanted to be rock

stars, but nowadays every teenager wants to be a tech entrepreneur' – said the Estonian Minister of Culture (Kovács 2017).

The small country has also provided the world with great brands. The most famous example is **Skype**, which has become a standard communications tool on the computers and phones of companies and individuals, and was acquired by Microsoft for USD 8.5 billion in 2011. **Playtech**, a digital gaming, online poker, and casino company belonging to the FTSE250 index of the London Stock Exchange also has Estonian roots. **TransferWise** was founded by the first employee of Skype, and in 2016 it helped users to perform international financial transfers worth 800 million pounds each month, which saved 30 million pounds a month as compared to traditional interbank transfers.

DreamApply is the most popular online application system for people who would like to study in higher education institutions abroad. According to the feedback, universities introducing the system increased the number of their applicants by 20–300 (!) per cent. **Taxify**, a competitor of Uber (trying to walk in the footsteps of Uber alternative taxi service in places where it has been banned), is also Estonian. Interestingly, there is a law in Estonia that deals with negotiated passenger transport, which enables individuals to enter the market of passenger services with the help of Internet applications.

Lingvist, an application for language learning, is also an Estonian development, which enables us to develop our skills in multiple languages. This is also special because Estonian is a language only spoken by a small number of people around the world – maybe this is one of the reasons studying and teaching languages are important for them. Another Estonian example is **GrabCAD**, which was founded with the goal of bringing together all the tools engineers need to manage and share CAD files into one easy-to-use platform. Another start-up called **Fortumo** offers various mobile payment solutions for web services and mobile applications. The **PipeDrive** application is a sales customer relationship management (CRM) tool for small and medium-sized businesses.

Last but not least, **Starship Technologies**, established by the founders of Skype, is a company developing small self-driving robotic delivery vehicles. The electric-powered rovers ride on sidewalks at a pedestrian speed (max. 6 km/h), can be remote-controlled if autonomous operation fails, and will only be used for relatively short-range local delivery. Since 2016, Starship delivery robots have been used by the Wolt online food ordering service in Tallinn.

The policy of encouraging start-ups is well demonstrated by the fact that the region is mentioned as the **Baltic Silicon Valley**, and Technopol, the largest start-up incubator hosts more than 50 tech companies. Considering the number of start-ups per 100 thousand inhabitants, Estonia is well above the EU average, and only Iceland and Ireland surpass the country in this respect (Kovács 2017).

However, the brands mentioned above ‘forgot’ one thing that would be important from a country branding point of view: none of them communicate their Estonian roots directly. Just imagine that every time you use Skype you see that it has Estonian origins – it would increase awareness regarding Estonia and develop the image of the country, adding to the communication of the E-Estonia message. In comparison, a much less effective but undoubtedly important solution is that there is a **showcase room in Tallinn** presenting the success of the **E-Estonia concept**: the far-sighted government, the proactive information technology sector, and the population open to innovation. The 360 square metre exhibition has received delegations from more than 120 countries, who got an insight into topics such as the development of digital society, digital and mobile identity, cybersecurity, smart city projects, transparency, or the Big Brother phenomenon. And, of course, there are a lot of e-topics: e-citizenship, e-government, e-healthcare, e-justice, e-taxation, e-police, e-school, and so on (<https://e-estonia.com/e-estonia-showroom/> 2016).

If we examine the influence of this smart E-estonia positioning on Estonian economy, we realize that the result is outstanding: at least one third of the 700% Estonian GDP growth is connected to information technology. According to data for the year 2017, the Estonian GDP per capita is almost USD 20,000, which is more than the GDP per capita of Hungary, Romania, or two other Baltic states (Latvia and Lithuania).

The nations listed above must face similar challenges: the number of births is decreasing, and so a shortage of skilled labour is expected in the future. Estonia even has a solution for this: **digital citizenship**, which is available for anyone. 10 thousand people applied for it in 2015, which is a big deal because only 13 thousand children were born in the country in the meantime. Of course, digital citizens do not live in Estonia but abroad. Still, according to a report, 400 of them established a company in Estonia and created 800 new workplaces. In addition, digital citizens only have to pay any kind of taxes if they take income out of the company – so, the adventure might be worth a try (Torontáli 2016).

And how serious is the Estonian government about this? According to their plans, this method will increase the number of their citizens to more than 10 million by the year 2025 (even if they are virtual citizens). This digital community may further develop E-Stonia.

Start-uppers are especially welcome in the system of digital citizenship. For a start, one of their websites provides 10 reasons for people interested in founding a company in Estonia (Kovács 2017, <http://startupestonia.ee/why-estonia> 2017):

1) *Estonia is the perfect place to test and establish your idea! You’ll find the no-bullshit-people here, who will tell you what works and what doesn’t.*

2) *Estonians are true techies – kids get programming skills from school and some schools even teach how to build bitcoin apps!*

3) *We do things fast! You can establish a company online in 15 minutes and do the taxes in 3 minutes!*

4) *Talking about taxes – Estonia has one of the most liberal tax systems in the world with zero corporate income tax!*

5) *Our e-government solutions are top notch! Furthermore, our start-up ecosystem works closely with the government to make Estonia the best place for start-ups to grow.*

6) *Life quality in Estonia is high but at the same time the living costs are low. Win-win!*

7) *51% of the country is covered with forest, we are surrounded by seas from two sides, and our air is the cleanest in the world. Sounds like a great natural environment to boost great ideas?*

8) *Estonian is a bit tricky to learn, but, luckily, we speak the international language of business!*

9) *Estonian start-ups raise more and more money each year! Come and see for yourself how they do it.*

10) *We have a strong tight-knit start-up ecosystem called #estonianmafia! Join the family – we've got you covered!*

In addition, the **digital economic ecosystem** will soon be accompanied by **digital money**: in August 2017, they announced that they would be the first country in the world to introduce the digital currency of the country called estcoin. According to their expectations, the government-supported ICO (initial coin offering) and digital investment fund would be extremely favourable for the Estonian economy and its so-called e-citizens (Dajkó 2017b). As the announcement was made when Estonia was already performing its **EU Council Presidency**, it is interesting to see the branding aspects related to it particularly because the Estonian government apparently **scheduled the announcement or launch of several technological developments to this period**. For example, the test operation of two self-driving buses was started in Tallinn, the capital, in August 2017.

7. Country Branding during the Six Months of EU Council Presidency

The agenda of the European Union Council – similarly to that of the European Union itself – is mostly defined in advance, and the presiding country always has to align to it. However, they do have the opportunity to **include policies that are especially important for the presiding country** with greater emphasis, and they also have the opportunity to present the country in general to the most important decision-making bodies.

Considering Estonia and the presidency of the country in the second half of 2017, it can be seen that the country was probably taking its opportunities more effectively than previous countries, which may also be justified by the fact that **one of the four priorities** of the Estonian presidency was **‘A digital Europe and the free movement of data’**. ‘We have proved several times that we are pioneering in this field, and therefore it is almost our duty to solve as many questions involving digital technology as possible.’ – emphasized Member of EP Marju Lauristin. Member of EP Yana Toom expressed her hopes that as a result of their presidency the use of digital services in the public sector would spread more quickly all around Europe because the Estonian government system has been praised in every forum for its openness and reliability. Besides, they have also laid special emphasis on the development of e-commerce at an international level (see Európa Pont 2017).

It is also important to highlight that the other three priorities besides ‘A digital Europe and the free movement of data’ were also closely connected to their country branding measures: ‘An open and innovative European economy’, ‘A safe and secure Europe’, and ‘An inclusive and sustainable Europe’. Digitalization, infocommunications solutions, and e-commerce also appeared in these priorities as much as possible.

At the same time, it can also be seen that **Estonians do not only consider the digital world very important but also regard nature as a priority**, which is no surprise as half of the area of the country is covered by forest.

As they described the country on the EU2017EE website, Estonia is a place where an affinity for nature and the benefits of digital society go hand in hand. ‘The story of Estonia is depicted in two values. At the base is a connection with nature, at the top is a story of new technologies and ways of living. The aim of finding balance and synergy between natural and man-made, old and new, is our unfolding story.’

8. Building the Country Brand Involving Estonians

One of the toughest challenges associated with the success or failure of the branding of a country is if locals, people living in the country can be convinced to stand behind the case and how much they can be affected to communicate about the country in a way preferred by the country positioning defined by the national government and the experts involved. This is an extremely sensitive issue in the Central and Eastern European region because there were similar attempts on the Eastern side of the Iron Curtain during the Communist/Socialist era, but these were considered the worst kind of propaganda, e.g. ‘we are the country of iron and steel’.

However, Estonia is skilfully balancing: its digital country brand platform, **brand.estonia.ee** is an excellent example of how to build a country brand involving local citizens facilitating uniform communications.

As the website explains to its users:

Brand Estonia helps you introduce Estonia in a way that attracts attention, creates trust and makes you proud.

It can be used by anyone who wants to talk about Estonia: businesses, government institutions, universities, organisations, events and people.

Here you will find the tools to introduce Estonia in a considered, clear and recognizable way. Together we will create the image of Estonia.

Considering the brand platform and usage, they formulate different levels called 'think, use, create, see'.

The think level includes character, core messages, story and verbal identity, and the use of words. Let us examine these in more detail.

Character

Nordic, surprising, smart. These are the essence of Estonia. These are what we want to be and to be known for. If we understand and present Estonia's values and advantages in the same way, our voice is stronger and more convincing.

These traits are not to be shouted out as slogans. For that we have our story and our core messages – they bring out Estonia's advantages and uniqueness. The values here are the starting point for all actions aimed at promoting Estonia. They are the essence of Estonia.

Table 3. *The character of the Estonia brand*

Nordic	Surprising	Smart
– Pragmatic	– Different	– Innovative
– Honest	– Individualistic	– Tech-savvy
– Straightforward	– Contrasting	– Curious
– Egalitarian	– Brave	– Discontented
– Close to nature	Effect: We attract	Effect: We are pioneers.
Effect: We are trustworthy.	attention.	

Source: *Brand Estonia* (2017): <https://brand.estonia.ee/>, downloaded: 27 August 2017.

Core Messages

These core messages are the first things you can say about Estonia. Pick any combination of them depending on the target audience. Always use at least one of the core messages when introducing Estonia for the first time.

Independent minds

Estonia's biggest asset is our people. Many of them have done significant things. Some are world famous and others known only to a few. What matters is that all of them have used their minds independently and brought their vision to life.

- Our society is not hierarchical
- Everyone can live up to their potential
- Easy and straightforward communication with the state

Clean environment

Estonia has a lot of untouched nature and a low population density. This is very rare in today's world. We know how to care for our environment and we are proud of it.

- We hold fourth place in urban air quality in the world
- 51% of Estonian territory is covered with forests
- 40% of the territory is organic collection area
- 17% of our farmland is organic
- 22% of our country is wildlife preserves
- From any point, the nearest marsh is always less than 10 km away.

Digital society

Estonia is the first country to function as a digital service. Our citizens and e-residents can get things done fast and efficiently. A number of world-renowned technology companies were born in Estonia and the nation boasts more thriving start-up companies per capita than anywhere else in Europe.

- The first country in the world to offer e-residency
- The first country in the world to vote online
- Three minutes to file your taxes
- Most entrepreneurial country in Europe

As it can be seen, digital society is just one of three pillars here. As we have already mentioned, half of Estonia is covered with forest, and the choice of nature may serve as some kind of counterpoint or balance with technology: they treasure Estonia's breath-taking nature, such as the forests and marshes, just as much as

their e-state solutions: 'in fact, you could say that we use the latter to spend more time enjoying the former'.

And why is 'independent minds' the first pillar? Probably because the commitment to eliminate the so-called homo sovieticus, a post-communist kind of personality, is still strong. This way, the Estonian state supports all initiatives that facilitate the self-reliance of people and decrease their dependence on the state. This also involves determined, almost extremely market- and enterprise-friendly economic policies (Átlátszó.hu 2016).

Story/History

'In Estonia, clean and untouched nature co-exists with the world's most digitally advanced society. It is a place for independent minds where bright ideas meet a can-do spirit.'

Verbal Identity

The way we speak reveals the way we think. The way we talk and write about Estonia is critical, as is the tone we use and our manner of speaking. Friendly: Write like you would write to a friend – be direct but polite. Don't fawn, flatter or apologise.

Unique: Focus on our uniqueness. Talk about things that catch your listeners' or readers' interest.

Content-rich: Do you have something new and informative to say to your readers? Avoid excess adjectives, don't be wordy or generic.

Down-to-earth: We always have a plan how to make our disadvantages work for us. Instead of saying how much it rains in Estonia, introduce people to mushroom picking. Also – use the word 'small' only in a positive context.

The brand comes alive

Of course, it is extremely important how a brand can come alive. As **the 'use' menu item** of the abovementioned website says: 'The easiest way to make Brand Estonia work for you is to use these ready-made materials to promote Estonia. Here you will find up-to-date and professional presentations, videos, publications and our official webpage. These materials are meant for businesses, government employees, tourism professionals, journalists and anyone else wishing to introduce Estonia to the world.'

Just to mention one aspect, **Power Point presentations** on this topic include examples such as:

- Need to introduce Estonia for the first time? – Here is a general overview.
- e-Estonia introduction – Want to introduce e-Estonia and the world’s first fully digital business environment?
- What is Brand Estonia? – Here you will find the Brand Estonia introduction.
- Fun facts – 12 fun facts about Estonia.
- Want to be brutally honest? – Here are 8 not so positive facts about Estonia.

These concise factual presentations have also provided valuable background information for this study (see: <https://brand.estonia.ee/use/presentations/> 2017).

The ‘**Create**’ menu item is even more exciting.

On the one hand, a **lot of quality photos about Estonia** are available in visual compositions according to the brand, which can be freely used for the promotion of Estonia as long as the source is indicated.

In addition, **the ‘EST’ game** also appears here, which is not only an abbreviation of Estonia but also the ending of several English words, e.g. as the superlative of adjectives. This provides the opportunity for a little game highlighting the ‘est’ part, be it campaigns, presentations, websites, or even souvenirs. A non-exhaustive list of such words is presented below.

Table 3. *Highlighting the EST part in English words as a superlative form of the adjective*

best	clearest	finest	lightest	scariest
biggest	closest	funniest	longest	shortest
blackest	coldest	greatest	loveliest	smartest
boldest	coolest	happiest	lowest	strongest
bravest	cosiest	healthiest	newest	sweetest
brightest	dearest	highest	oldest	warmest
busiest	deepest	hippest	prettiest	weirdest
chilliest	easiest	hottest	proudest	whitest
cleanest	fastest	largest	safest	wildest
				wisest

Source: *Brand Estonia* 2017 (<https://brand.estonia.ee/>, downloaded on: 27 August 2017)

Besides, there are English words where EST does not appear as the superlative form of the adjective. Examples include: **forest**, **guest**, **invest**, **manifest**, **modest**, and **festival**.

Another ‘wordplay’ and part of the branding process according to the E-Stonia concept is that they ask people to ‘Create a link between positive and progressive words starting with the letter “e” and Estonia so that these e-words become synonyms for Estonia.’ A few examples can be seen below:

Table 4. *E-words, starting with the letter ‘e’, which can be linked to Estonia in a positive and progressive way (E-stonia)*

eager	electronic	encouraging	especial	expectant
eat	embrace	enjoy	even	experience
edifying	eminent	enlightened	excellent	experimental
educational	emphatic	enter	exciting	explore
effective	empower	entertaining	exhilarating	expressive
efficient	empowering	enthraling	exotic	exquisite
egalitarian	enable	enthusiastic	expand	extend
electrifying	enchancing	e-residency	expanding	extensive
				extraordinary

Source: *Brand Estonia 2017* (<https://brand.estonia.ee/>, downloaded on: 27 August 2017)

Last but not least, an important part of the ‘Create’ point is how to involve Estonians (who are otherwise active in social media) in the country branding process. The website facilitates it by providing help to include a pebble-like image in the Facebook cover picture and the profile picture. The pebble (at least, this form) is again an Estonian characteristic, which is also part of the visual identity of the Estonia brand.

The ‘Design’ menu item of the brand.estonia.ee website provides help primarily for graphics experts and design professionals and is closely connected to the above point. This part also determines the fundamental principle that: ‘The visual language of Brand Estonia is light, clean and simple. Simple as in clear, but also smart. Clean as in uncluttered with unnecessary elements and confusing typography. Light because we leave enough room around text and images; that makes them easy to read and the focus will be on the content.’

Two other design aspects must also be mentioned. There is no central country logo. Instead, they use wordmarks that are connected to Estonia and a specific topic. They have a distinct graphic form and usage rules. The text of each mark is related to the topic’s key search terms or URL, thus helping to reach the info easier.

The other aspect is that the country has its own official typeface called Aino, created by Estonian Design Team and Anton Koovit. From a certain point of view, it is the most widespread and recognizable element of the brand as it communicates their ideas in all mediums – in print and on screens, in long and short texts.

9. Conclusions, Findings

At the end of the study, it is worth drawing the most important conclusions provided by the E-Estonia case study. This may also serve as a guideline for other countries.

There is no successful country branding without a country strategy

The case of Estonia clearly shows that country branding is much more than the creation of a logo with a characteristic design or the creation of a catchy slogan.

Moreover, it is much more than strategic communications. A fundamental prerequisite of successful country branding is a successful country strategy. Examples include the ‘Positively transforming’ concept, which was first used in 2002, but at about the same time another concept was born, which later became a vision and a kind of mission: the ‘E-Estonia’ concept.

A country must find a unique position that corresponds to the classical rules of positioning

Estonia’s position is like that: it is based on something which is the strength of the country, something that provides sensible advantages for investors, tourists but most importantly to locals; it can be clearly distinguished from the positioning of other countries; it is based on macrotrends. All in all, it is true that it is distinguishing, relevant, true, concrete, motivating, and strategic.

Whatever the size of a country is, it can be branded

Considering its area, and, especially, its population, Estonia is not only one of the smallest countries of Europe but also of the world. It still managed to find a unique proposition that can distinguish it, and make the country interesting for the world.

Country branding has its steps that countries have to follow

For states breaking away from the Soviet Union, this has meant the following: in the early 1990s, they had to introduce themselves to the world: ‘we are here’. Then they had to demonstrate that they are just as normal states as any other: ‘we are normal’. Only after these two phases could the third one follow, once they had already discussed in what sense they were different from others: this was (and is) the ‘we are special’ period.

Good country branding affects all six dimensions defined by Anholt

The E-Estonia strategy was primarily created with the purpose of promoting investments, but it actually affected many other things:

- Government policies, for example, ID-kaart, e-government, companies that can be founded within 18 minutes, or the fact that Estonian children can study programming from the age of 7.

- People because the most advanced digital society of the world is developing here, although this is always kept in balance with nature.

- Export as Estonia mostly provides digital brands for the world such as Skype, PlayTech, Transferwise, DreamApply, Taxify, Lingvist, GrabCAD, Fortumo, PipeDrive, or Starship Technologies; and several other start-ups are likely to appear here.

- Tourism as many people visit Estonia because this modern digital world in harmony with nature is exciting for them.

- Investment and immigration; it is enough to think of digital citizenship.
- Culture because this does not only mean classical culture but also how the country can represent it today, what cultural values it creates for the world in the present.

A good country brand concept has a positive influence on economic performance

Estonia is an excellent example of the development path that a country may achieve within years or decades through a good strategy. The former Soviet member state became the front-runner of the Central and Eastern European region, and its GDP does not only exceed that of the two other Baltic states but also that of Hungary, for example. However, we must also add that Estonians prefer to consider themselves as a Northern people, not as a Baltic or Central/Eastern European one.

Success must be proudly presented to the world

Among other things, the E-Estonia Showroom in Tallinn also serves this purpose. They have received delegations from 120 countries, who could get acquainted with this unique country branding strategy and country strategy.

All international events organized in the country must be related to the country brand concept

The case of Estonia demonstrated this well in connection with the 2002 Eurovision Song Contest, which was one of the reasons to prepare their first country brand book, and the same was expected from the 2017 EU Council Presidency (see the next paragraph).

If there is a country branding strategy, it is much easier to utilize the six months of EU Council Presidency

In the case of Estonia, priorities were almost obvious. One of the four themes was clearly connected to the brand essence of the country ('A digital Europe and the free movement of data'), but the other three also included related ideas: 'An open and innovative European economy', 'A safe and secure Europe', and 'An inclusive and sustainable Europe'. This was also facilitated by the fact that Estonia has always wanted to be the top student of the EU, and government materials expressly mentioned this as early as 2004, before joining the EU.

Wordplays with the name of the country work well in country branding, especially if you want to raise awareness

We can see several examples of this concept. It is enough to think of Slovenia's slogan 'I feel sLOVEnia', but some years ago the Czech Republic also had a campaign based on the Facebook-like craze called 'The Czech RepubLIKE'. As mentioned above in this case study, Estonia even considered replacing its original country name with E-Stonia. Instead, they now use E-Estonia in many contexts, and it is worth checking out how many wordplays the brand book suggests, be it words including 'est', or ones simply starting with the letter 'e'.

Good country branding involves local people but does not create the impression that it is propaganda

Estonia is also balancing well in this field. Its brand book leads and directs but does not control anything. It provides tools for Estonian citizens to highlight the appropriate items if their country is mentioned in any forums.

This is great help to ensure the awareness of Estonia and support the reshaping of the country image in a more uniform way.

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