



Improving Norway's reputation

Prepared for: The Norwegian Ministry of Foreign Affairs / Innovation Norway
Prepared by: Lars H. Thorkildsen/Håkon Kavli
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”...a country rarely mentioned in the news, as it seems so quiet that nothing ever happens there; not very present in any media, nor visible in communication campaigns; not present in politics and not part of the EU (hence not present in all important meetings of the EU)”

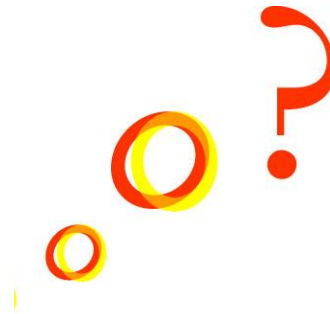
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1. Project Background and Overview

In 2007, The Minister of Foreign Affairs, Mr Jonas Gahr Støre, established a *National Reputation Forum* in order to obtain appropriate professional recommendations in regards to the Ministry's efforts in profiling Norway abroad.

The purpose is to position Norway on the international arena - politically, culturally and financially.

Key tasks in the early phases of this work have been:

- ✚ To analyse how the Ministry may better coordinate and direct the efforts and behaviour of the wide number of different Norwegian players on the international arena – including a discussion of which reputation dimensions or values one should endeavour to develop and improve.

- *The analysis concluded that this effort should aim to build and reinforce a picture of Norway as*

A RESOURCEFUL, COMMITTED AND RELIABLE PARTNER

- ✚ To analyse which nations the Ministry should prioritise in its efforts to improve Norway's reputation – allowing for recent and expected international developments.

- The analysis resulted in the selection of the following 19 nations:
- *Brazil, Canada, China, Denmark, Finland, France, Germany, Holland, Iceland, India, Italy, Japan, Poland, Russia, Spain, Sweden, Turkey, United Kingdom, USA.*

- ✚ To develop and make available to interested Norwegian parties abroad “stories” about Norway’s history, character, resources and achievements - suitable for building updated and desirable perceptions of Norway among their audiences
 - The development of these “stories” are well on its way

- ✚ The commissioning of market research studies to achieve an up-to-date insight into the reputation of Norway abroad in the markets identified as priority markets

This particular document aims to:

- ✚ Summarise main findings from this research
- ✚ Identify implications and guidance for the Ministry in its further work towards clarifying, reinforcing and illustrating the desired picture of Norway as ***“a resourceful, committed and reliable partner”***



2. Norway's reputation 2008: Research findings

2.1 How does one measure a nation's reputation?

What exactly is the reputation of a nation, why is it important, and how does one measure it?

The phenomenon of nations and their citizenry is one of our strongest social concepts. A nation provides identity to its citizens, communities and companies, and the existence of the multitude of nations helps us organise our perceptions of the world. Peoples, products, companies, athletes, food, climate, activities; major parts of our complete experiential arena may be categorised according to national origin.

Accordingly, how the world perceives a nation and its citizenry has considerable impact on relationships and behaviour – whether we talk about politicians and governments, civic institutions, companies, cities, families or single individuals.

Hence, it is important for a nation and all social units being part of or associated with that nation, that the reputation of their nation adds value to their being. For a company to be Norwegian should be an advantage when that company tries to sell its goods. Being a Norwegian politician or a Norwegian scientist should ideally mean that your statements are listened to respectfully, and Norway as a country would benefit from being seen as an attractive tourist destination and an attractive place in which to work or study.



Therefore, to measure a nation's reputation one must elicit perceptions from both

- ✚ the general public of other nations
- ✚ people in key positions in those nations, who in their professional capacity deal with their counterparts in other countries – i.e. journalists, politicians, public officers, management of private companies and non-government institutions, scientists, artists etc.

The Norwegian Ministry of Foreign Affairs, together with Innovation Norway, have commissioned research of perceptions of both these categories. The following chapters provide an insight into the findings from these two sources of information – the public and the opinion formers in the countries selected as prioritised nations.

Before we proceed to describe research findings, however, it may be appropriate to dwell shortly on another interesting and very complex issue:

How is the reputation of a nation being formed in the first place?

The reader would probably reflect on the extent of *media attention* as being essential. As will be discussed shortly, size and prominence of the nation are among the issues that influence media attention and hence the reputation of the nation.

Clearly also, the engagement of the nation in interchange with others must have a bearing – such as its outgoing and ingoing tourist streams, the extent of its foreign trade, the presence and activity levels of its national representatives in international bodies and associations (professional, religious, humanitarian, political and cultural) and its degree of interchange of students and labour.

Presumably, therefore, the behaviour standards and character of the nation's inhabitants may also have a bearing. (Don't we all generalise about typical national traits?)

Further, school and university literature coverage about the country is important – and so is the view of historians on the evolution and contributions of the country expressed in this literature.

The impressions formed by nationals in prominent positions clearly influence a nation's reputation. An obvious example is the impact on the US reputation of the behaviour and politics of its president. Similarly, idols from the entertainment industry, from sports, and different cultural arenas, such as music, literature, performing and visual arts are all significant contributors. In this category we can also include designers and architects. In fact, visual impressions from famous national icons (buildings – hence architecture (f.ex. the Sydney Opera House, the Taj Mahal mausoleum, the Colosseum), the statue of Liberty, the Chinese Wall, the might of impressive national landscapes – the Swiss Alps, the Norwegian Fjords) must have a bearing on the national reputation.

As will be seen shortly, globally known consumer brands are also surprisingly important ingredients in shaping today's public impressions of a nation. Obvious examples are Coca-Cola, IBM, Volvo. Similarly, events of international importance colour the world's impression of a country. The Davos Meeting, the Olympic Games and other sports events, Music festivals etc.

So as we proceed to the findings of the research, it may be worth contemplating shortly what we expect Norway's reputation might be.

2.2. Anholt Nation Brands Index – a survey among the public

The “Anholt Nation Brands Index”¹ is an international market research study that measures public perceptions of nations every quarter. This on-line interviews study is based on samples of 200-1000 respondents in each of 35 countries measuring perceptions of altogether 40 countries².

¹ Copyright Simon Anholt and GMI, Inc.

² Now expanded to 50 countries

The study measures public perceptions of nations across *six areas of national competence* – Exports, Governance, Culture & Heritage, People, Tourism and Immigration & Investment.

The Reputation Forum has commissioned an Anholt report for Norway from 1st quarter of 2007.

Table 1 displays rankings of Norway along the 6 areas by 17 of the 19 nations included in the Reputation Improvement effort.

Table 1: Ranking of Norway’s “brand” dimensions by the public in 17³ countries

Competence area	Sw	De	US	UK	Ger	Fr	Jap	India	Bra	Ch	Ru	Can	It	Ne	Pol	Spa	Tur	Average
Exports	9	7	17	18	10	12	11	22	20	18	13	10	12	10	10	12	12	14
Governance	3	1	11	5	4	4	6	16	7	8	6	6	4	4	3	2	6	4
Culture & Heritage	11	14	19	27	13	20	22	32	24	22	13	16	17	13	16	21	24	18
People	5	4	11	13	5	7	12	22	17	13	13	8	8	5	4	13	19	12
Tourism	8	12	14	18	11	14	13	24	21	13	22	14	13	11	19	16	27	17
Immigration & Investment	6	6	13	12	5	11	13	18	16	14	15	9	13	5	5	10	12	13
Total	4	4	14	15	6	10	13	22	17	15	13	10	10	7	8	12	12	14

Key learning from the Anholt study for this project is the following:

- Norway is rated as the 14th most appealing nation. Its best competence area result was for Governance (4th position).
- The competence areas in which Norway displays the poorest scores are *Exports*, *Culture & Heritage* and *Tourism* – hence these areas emerge as key ones for potential reputation improvement.

³ Finland and Iceland were not included

- ✚ From the ratings of Norway by these 17 countries, we find it surprising, (some would say concerning), that the US and the UK publics do not rank Norway noticeably better than the average score for Norway among all 35 panel countries
 - The *US* rank Norway as poorly as *number 11* in “Governance” – compared to the average rating as *number 4*.
 - Only the peoples of India and Indonesia provided a lower ranking of Norwegian governance than the *US*

Each competence area is constructed from several single indicators – the ratings on which are listed in table 2 below

Table 2: Ratings of Norway among 40 nations on all indicator attributes by the public in 17 countries

Indicator attribute ⁴	Sw	De	US	UK	Ger	Fr	Jap	Ind	Bra	Ch	Ru	Ca	Ita	Ne	Pol	Sp	Tu	Tot
Makes major contribution to innovation in science/technology	11	11	20	17	11	15	13	21	19	21	15	15	13	11	10	11	13	16
Country effect on product purchase	6	4	13	15	10	12	14	24	17	16	12	12	10	7	10	8	11	13
Govern. competent, honest, fair	5	2	9	7	4	4	6	16	10	8	6	6	3	3	3	2	6	6
Respects HR, treats citizens fairly	3	1	11	6	3	5	4	16	10	8	5	6	2	3	3	2	6	4
Responsible peace & security	5	2	9	6	4	8	8	13	6	7	6	5	2	3	3	2	7	4
Responsible in envmt/poverty	4	2	11	4	4	3	6	16	9	8	6	4	2	3	3	2	6	4
Excels at sport	6	11	16	22	10	16	18	28	23	20	9	13	14	15	11	17	19	17
Rich cultural heritage	21	22	21	28	19	25	22	37	23	22	21	17	19	19	19	19	23	23
Interesting/exciting contemp culture	18	14	22	28	13	19	19	30	24	21	21	18	18	18	17	15	18	22
People w'd make me feel welcome	9	7	13	13	6	13	12	28	18	7	17	9	13	8	6	12	23	12
W'd like person from there as friend	4	5	12	14	6	7	12	24	17	11	13	12	14	9	6	11	14	14
W'd employ well-qualified person from this country	3	4	6	9	7	5	10	20	17	14	10	9	11	7	5	9	9	11
Likely to visit if money no obstacle	14	14	13	18	6	11	14	22	19	12	18	13	12	11	13	4	20	16
Rich in natural beauty	2	4	9	7	4	15	5	23	22	7	12	11	10	2	5	4	20	8
Rich in built/historical heritage	25	26	19	27	23	27	24	27	27	20	26	20	20	21	21	20	21	26
Willing to live/work there for substantial period	8	6	10	12	6	9	12	20	16	10	13	9	11	7	4	9	10	11
Good place to study	8	11	11	13	8	11	14	18	16	15	13	12	11	8	9	6	12	12

⁴ Abbreviated attribute wordings

- ✚ For the *Exports* area result, the single indicator score for “Innovation in Science & Technology” (“*This country makes a major contribution to innovation in science and technology*”) is the poorest performing indicator
- ✚ In the Culture & Heritage area, “Cultural Heritage” (“*This country has a rich cultural heritage*”) and Contemporary Culture (“*This country is an interesting and exciting place for contemporary culture such as music, films, art and literature*”) pull the rating down.
- ✚ In Tourism, the weak indicator of the competence area rating is “*This country is rich in built heritage/historical heritage*”.

One may ask: *Is 14th position overall an impressive, satisfactory or poor result?*

In our opinion, it is not interesting for the Reputation Forum to dwell on the assessment of this particular result as being good or bad – since this is a rating based on Anholt’s chosen and standard perspective of reputation dimensions – rather than a measure based on specific objectives for Norway defined by the Reputation Forum.

However, on the assumption that this issue may be raised by other readers of this report, we offer the following comments: Since the report is based on a population sample, respondent *awareness* of each country is a necessary (but not sufficient) foundation for a good result. Respondent awareness of a given country is largely a function of media coverage in the respondent country. In turn, media coverage is a result of the country’s international prominence (to which its population size and its national economy would be two important contributors). As could be expected, large countries therefore tend to score higher than smaller countries.

This fact may be seen as a limitation of the value and fairness of the study from the perspective of smaller nations. However, the survey does include questions on behaviour – so it appears possible to analyse results based on the parts of the sample that

- ✚ have visited the country
- ✚ have had friends from the country
- ✚ have purchased products/services from the country.

A way of neutralizing the effect of country size would be to base the analysis only on respondents with affirmative answers to these behavioural questions. However, such an analysis would require figures year by year (or even a longer period) rather than single quarter ones in order to accumulate a sufficient sample base. And since the key value of the survey to this particular project is in providing a comparable measure of position over time – rather than giving a “fair” reflection of Norway’s position compared to other countries – we would advise against this additional cost.



2.3. Qualitative research studies among opinion formers in 19 countries



2.3.1 The multi-country qualitative research project – methodology and challenges

During 2008 and the early part of 2009, qualitative interviews of opinion formers were conducted in each nation selected as a prioritised country for the Reputation Improvement effort.

The main purpose of these studies was to provide, in each country, a basis for local activity planning and improved coordination between the embassy and the local Innovation Norway office. Therefore, the studies were not highly coordinated across the 19 nations.

Synovate was asked to provide a standard interviewing guide for the project after the completion of approximately 1/3 of the local studies. In some cases, this guide was subsequently modified locally from the suggested template. Also, in some cases, criteria for sample composition were selected locally, which limits the suitability of the local report for comparative analysis.

An analysis of each report has been implemented during July 2009 and comparative findings are reported in the following.

In spite of some limitations in direct comparability we find considerable consistency, and *are fully comfortable that the picture reported on the ensuing pages is an appropriate representation of opinion former perceptions in the 19 countries as a whole*. In the following section, we will report this typical picture of Norway across the 19 countries. Discussion of overall direction for the Reputation Improvement effort may thus be based on the content of section 2.3.2.

Qualitative market research projects rarely aspire to be representative of the target group(s) they cover. The main strength of qualitative research is the achievement of better understanding of the perspectives on the subject matter of each single individual.

The methodology allows the pursuit of open-ended conversation and use of questions and observations that enable respondents to express reasoning and emotions – including non-verbal communications. It is often used as the dominant research method vis a vis opinion leaders/formers and in studies involving professional occupations, leaders in industry and society and other experts.

Most of these local qualitative research projects were implemented as 25 in-depth interviews with opinion formers in business, politics, public bureaucracy, media, scientific research, arts & culture, environment & energy. Hence the project covers quite an extensive number of influential respondent categories, each of which could easily have been subdivided again⁵. Most interviews were conducted face-to-face (“F2F”) – but in some markets telephone interviewing was used wholly or partly, mostly for reasons of geographical distance. Typical length of interview was 45 minutes +. In 3 markets, focus groups were preferred to depth interviews.⁶

Subsequent sections provide comments on *groupings of countries* that add a slightly different, or rather, supplementary, perspective to the typical picture. However, *none of these groupings provide a significantly contrary perspective to the typical picture provided in 2.3.2 below.*

⁵ It was not a realistic objective of this project to draw conclusions about each of these subcategories of opinion formers within each country separately – but rather about opinion formers of the country in general. However, if planned at the outset (at a different occasion), it would be possible to analyse findings by both countries *and* sector target groups, issuing reports for each of the 19 nations and each of the 7 sectors summarised across those 19 nations – i.e culture, business etc.

⁶ For a listing of methodology etc for each of the 19 studies, please refer to the Appendix

The (groupings of) countries that provide such additional perspectives are:

- ✚ China/India/Brazil (2.3.3)
- ✚ Russia (2.3.4)
- ✚ Non-Nordic EU member countries (2.3.5)
- ✚ Nordic neighbour countries (2.3.6)

Some countries (USA, Turkey, Canada, Japan) have not been specifically included in any group. This reflects the fact that they do not display a very different perspective to the typical picture. However, this assessment of difference is a matter of judgement and degree. Of course opinion former perceptions in every nation do to some extent differ from those of their colleagues in all other countries. Therefore we have also included a brief commentary on certain traits of individuality in the US, Turkish and Canadian reports in section 2.3.7

The report on Japan is different in depth and scope and also limited in terms of respondent sample. While we are therefore unable to assess Japan as being similar or different to any group of nations, the report does provide sufficient information to confirm the general picture of perceptions of Norway described in 2.3.2. We also include a few brief comments on Japan in 2.3.7, but point out that in this country there may be a need to do some further market research of opinion former perceptions for an improved foundation for local planning of the reputation improvement effort.

The 19 reports contain interesting information on the cultural characteristics of each country, and pinpoint similarities and differences of the country relative to Norway. Reports also contain examples and suggestions of initiatives required to improve awareness and knowledge of Norway, and in particular to correct some of the quite unfortunate misconceptions. This is important and useful information for each embassy when calibrating and adapting the story about Norway and Norwegians for local use.

2.3.2 Opinion former perceptions – *typical picture across 19 nations*

1. Overall impression of Norway and Norwegians

In all cases, reports from the opinion formers provide a vague, but positive impression of Norway, both in terms of its beautiful nature and in regard to the Norwegian society and way of life – but they also provide an impression of a small country in the world's periphery, where very few events of interest occur.

Whilst Norwegians are liked and appreciated by most as open, social and direct; those that have not visited the country or met any Norwegian, tend to imagine the Norwegian character to be coloured by the climate of the country: Cold and reserved, even a bit slow.

2. Unaided top-of-mind picture

For this unaided top of mind picture, we have chosen to present some statements as “quotes” from an imaginary opinion former.

✚ *Limited overall knowledge and awareness in the 19 countries reflect Norway's small population base and remote geographical position.*

“I rarely see or hear anything about Norway from where I sit. It is far away, the media seem to mention Norway very rarely, if at all. I assume this means it manages itself quite well – and that Norwegians are calm and phlegmatic people. But then it could also mean that they are an introvert kind of nation, focusing mostly on its own affairs”

✚ *Even opinion formers struggle in separating Norwegian attributes and characteristics from those known for Scandinavia as a whole*

"It is a country in Scandinavia, of course - so it is a stable democracy offering extensive welfare to its citizens, such as good health services and education standards. And the Scandinavians are quite egalitarian. Social differences are clearly smaller than what we find in most countries, and the standard of living is high. I believe women's rights have come further there than in our country. Of course, they secure this high level of social welfare by means of high taxes. It is also quite expensive living there, I understand. And they are a monarchy - not even their king and his family seem to be doing much wrong."

✚ *The top-of-mind essence of Norway's identity within Scandinavia is*

- *nature/fjords*
- *the Arctic ("polar circle"),*
- *long coastline,*
- *salmon/fish*
- *oil*
- *(although less top of mind) seafarer/explorer history*

"What separates Norway from the rest of Scandinavia? I know they have astoundingly beautiful nature, with deep fjords surrounded by mountains, and the midnight sun up north in the Arctic. I'd like to take that mail ship up to the North Cape once. It must be very cold in Norway, and they have long dark nights during winter. I have heard their suicide rate is quite high - mostly for that reason..."

...They have oil in the North Sea, and have become quite rich as a nation because of it. I understand they aren't suffering as badly as we are from the economic downturn at the moment - exactly for that reason.

Their salmon is very nice. In fact, they catch a lot of white fish also - so I suppose we are talking fish exports in general.

I am quite fascinated by the Norwegian Vikings and what they achieved in their time - and Norwegians have really continued as seafarers and explorers since then, haven't they? Was it not a Norwegian that first reached the South Pole? And of course I know of Thor Heyerdahl and his fleet. They are pretty good seafarers still, I think, the Norwegians.

I believe Norwegians are pretty good also at protecting their environment, which makes sense. Since they have such beautiful nature and depend on the sea for their livelihood, they would be keen to keep and protect these resources for future generations.

I think they once had a female prime minister who was a bit of a pioneer on this issue - Brundtland, was it not?

I have met a few Norwegians. They seem quite nice and outgoing, well educated, and they speak good English, actually."

3. Specific impressions from each arena – politics, culture, business

Impressions of Norwegian domestic politics

As indicated in section 2, respondents typically have limited specific awareness of Norway's domestic politics. Perceptions are mostly based on their image of Norway as part of Scandinavia – so Norway

- ✚ is a welfare state with strong social support mechanisms,
- ✚ is an egalitarian, calm, stable, peaceful society with equal gender rights and (presumably) high tolerance of minorities
- ✚ offers solid infrastructure, health services and education to all citizens

There is also a perception of Scandinavian countries being ethnically relatively homogenous societies. Some respondents point to this homogeneity and the limited population size of each country in order to partly explain the smooth functioning of Scandinavian societies.

Norway is seen as more remotely located than other Scandinavian nations, and perhaps more provincial, self-sufficient and isolationist – trading mostly with the other Scandinavian countries. (In other words, the truer picture of a small country with a very open economy depending heavily on extensive interaction and trade with the rest of the world, does not dominate perceptions...) Norway's decision not to join the EU seems to have contributed strongly to this impression

The interest and activities of Norwegian politicians into environmental protection issues in general and reduction of greenhouse gas emissions and CO2 capture more specifically, are among the better known and more visible aspects of Norwegian politics, and generally capture a lot of attention and interest. (On the other hand, many respondents voice concern about Norway's active "killing of whales" – which they implicitly appear to consider both irresponsible and cruel)

Impressions of Norwegian foreign policy

It is not obvious to the typical opinion former across these 19 countries that Norway is a member of NATO - although, of course, many are indeed aware. Rather, Norway's peace diplomacy may have created an impression of a pacifist country – a position that appears inconsistent with NATO membership. Norway's full and active support for the UN is generally known, however.

Similarly, Norway's generous development aid is known to and appreciated by many respondents.

Norway's preparedness to engage in peace diplomacy and generally to promote peace is known among many opinion formers. The Nobel Peace Prize is the most visible single element of this, but other initiatives and contributions are mentioned by different respondents. This commitment is seen as commendable, but there is also a fair amount of scepticism both in terms of results achieved and in terms of the degree of realism for a small nation to be able to make a difference in international matters.

Impressions of Norwegian industry and business culture

Norwegian industry is typically seen as dominated by fish, oil and other maritime industries, forestry and agriculture. An important limiting factor for Norway's reputation is the lack of internationally known and distributed Norwegian branded consumer products. This issue is important because a nation and its branded consumer products act in a reciprocal process in building perceptions in other countries, i.e. national reputation adds value to the branded product, but the brand also contributes to the national reputation. Ikea and Volvo are important examples in the case of Sweden.

For Norway, this factor supports the perception of an isolated country that mostly trade with its immediate neighbours – and whose industry tends to be more rural than urban. This also seems to be working as one of several indicators that Norway does not have much manufacturing industry nor particularly talented designers and marketers.

Typically, the salmon is referred to as the closest thing Norway offers to a branded consumer product. Statoil is mentioned in some reports, as are Norwegian cruise ships, DNV (Veritas), Stokke, TINE and Helly Hansen⁷ – but in most reports no specific brand is recognised or recalled.

The sectors of technology recognised as being strong in Norway, therefore, are those seen to be required in order to sustain strong positions in fish farming, shipping, offshore, oil and gas extraction.

The typical impression of Norwegians in business is that they are nice people to deal with - open, honest, reliable, friendly and interested in social exchange. They are generally well educated and speak English well.

They also speak their mind directly and firmly – which tends to be seen as strength. On the other hand, they may be seen as inflexible when it comes to negotiations on price and terms. Quite a few comments are made to the point that Norwegians may be efficient in their operating principles – but they are not seen as particularly innovative, energetic or marketing oriented.

⁷ In some countries, one or two more brands are mentioned in the category of outdoor wear (Bergan, Odlo) – thus suggesting that this product category could become a strong reputation area internationally for Norwegian manufacturers

Impressions of Norwegian culture

Whilst many opinion formers mention names such as Grieg, Munch, Ibsen and Hamsun, there is a dearth of internationally well known Norwegians from the contemporary culture sector. Some names are mentioned in some reports, but no single Norwegian representative of literature, arts, music etc is seen to have achieved a truly international name. This also applies to sport. So the culture sector adds to the impression of a low profile, well administered country where nothing happens. International recognition of art and culture activity is a very important criterion for interest and acceptance. Active regional artists, musicians etc not known outside of Norway may well be of interest, but tend to be seen more as a confirmation of provincialism than as an indication of cultural dynamism.

However, there is openness to the possibility that Norwegian contemporary artists may be competitive in certain sectors – and a number of single examples are mentioned in one or two reports – such as the Oslo and Bergen Philharmonic Orchestras, Jan Garbarek, Liv Ullman (mostly thought to be Swedish), writers Erlend Loe and Jo Nesbø, Jon Fosse as a playwright. Aha, Røyksopp and Kings of Convenience receive mentions also in the music sector – as does Sissel Kyrkjebø.

The New Opera House has been registered in most countries as an impressive building (also architecturally) and an indicator of interesting cultural activity. Otherwise, there is limited awareness of Norwegian architecture as being particularly exciting – be it historically or contemporary

The Norwegian Film industry is not seen to be particularly dynamic or interesting – which is concerning, as this particular arena more than most is considered very effective in conveying rich cultural impressions of a country – both of national history and of today's society

A perhaps surprising find relating to Norwegian culture that has the potential of counteracting the impression of provincialism, is the fascination - also with opinion formers - by the myths and exploring adventures and characters of Norwegian Vikings, including Leiv Erikson. This combines with their awareness and admiration of other famous Norwegian explorers, such as Roald Amundsen, Fridtjof Nansen and Thor Heyerdahl - and is extended to comments about today's Norwegian shipping fleet, and Norway's explorations in the North Sea. This series of historical facts communicate to many respondents an impression a national urge to explore and discover. This is expressed quite consistently in different forms in all or most reports.



Impressions of Norway in sport

Overall, Norway does not come across as well as one might have expected in sport, although Norwegians are seen as a very fit nation. Their harsh living conditions and beautiful nature both indicate it must be so – and there is some awareness that Norwegians spend much of their spare time outdoors – particularly as a family activity.

Since winter sports (ski jumping, biathlon, skiing, speed skating) are not generally popular in the context of such a wide band of countries, the fact that we are known to be skilled in those sports does not fully compensate for our being relatively invisible in global summer sports, and above all, in men's soccer. However, the Norwegian female soccer team gets mentions.

4. Strength of associations with Norway of 12 provided attributes

Although there was some variation in interview guides and research methodology from country to country, respondents in most markets were asked to indicate perceived strength of association with Norway from 12 pre-worded attributes. In other words, in this part of the interview respondents were not asked for unaided, top-of-mind associations – but provided specific statements for respondents’ assessment. So we are looking at respondent thought processes like: “Does this fit with my current perceptions and/or knowledge of Norway and Norwegians?” A relatively clear and homogenous pattern emerged – see fig 1 below:

Figure 1: Strength of associations - 12 attributes

Environmentally friendly nation
Leading innovator & specialist in oil/gas technology
Represents equal rights in society
Leading innovator/specialist in marine biology/sustainable fish farming
Manufactures high-quality products
Leading innovator in technology for a cleaner environment, such as carbon capture and storage
Leader in international peace diplomacy
Entrepreneurial nation
Reliable partner in defence and security
Important player in internat’l energy policy making
Cutting edge scientific research and innovation
Dynamic cultural and artistic sector

The 4 green coloured attributes

are seen either as knowledge that respondents already possess about Norway, or logically connected to such knowledge, so even if respondents might not be specifically aware of the substantiation for each attribute, they rate them high as associations. I.e., respondents typically do not *know* the specifics of “innovation in marine biology” – but assume that Norway’s high quality farmed salmon (which they do know) implies such innovation

We see that Norway is clearly seen as *environmentally friendly*, and as *representing equal rights* – and it makes sense to respondents that Norway is an *innovator in oil and gas technology and marine biology/sustainable fish farming*

The 5 yellow coloured attributes

are partly not very strong associations, and/or they are met with some scepticism. As a highly developed nation, it is accepted as plausible that Norway “*makes high-quality products*” – but typically respondents do not know any other Norwegian product than farmed salmon – and thus strive to commit to this statement.

The statement “*Leading innovator in technology for a cleaner environment, such as carbon capture and storage*” partly overstates perceptions, and is partly seen as controversial (carbon capture is not accepted as a breakthrough solution).

Whilst it is recognised by most that Norway does have some credentials in *peace diplomacy* (most known is the Nobel Peace Prize) – the term “*Leader*” is rejected due to Norway’s insignificance in population size – and hence the wording oversteps respondent perceptions

Norway is not really seen as “*entrepreneurial*” in a general industry sense. This is partly due to the lack of observable, branded consumer products from Norway – an important point which constrains perceptions of Norway in several ways (the “quality product” limitation having already been mentioned). Also, we are seen to be happy and comfortable, rather than “hungry” – thus followers more so than initiators.

“*Reliable partner in defence and security*”: Norway is seen as peaceful and calm and therefore safe to visit – an important positive factor in a tourism context – but its role as a partner in defence and security is not seen as *significant*, partly due to its midsize, partly due to its (perceived) neutrality and pacifist tradition, and partly because of its peace diplomacy ambitions. As mentioned, Norway’s NATO membership is not necessarily known outside of its geographically near circles.

The 3 red coloured attributes

Norway is *not* seen as an “*important player in international energy policy making*”. Whilst accepted as energy-rich, the scope of its resources is not fully appreciated. More importantly, its self-chosen position as a non-member of both OPEC and the EU tend to suggest to respondents that it neither wants nor has any real influence on world energy policy.

Whilst the standard of Norwegian scientific research in some niche sectors is seen as impressive, the country is *not* seen as investing strongly in research. In particular, it is *not seen as innovative* – for several reasons. As mentioned in the context of “entrepreneurial nation” above, a rather general impression is that Norway’s richness in oil leaves Norwegians “fat and happy”. Further, many respondents perceive that innovation mainly occurs in the private sector, and most typically in industries manufacturing consumer products. The high government ownership in industry (known by some, not all) and the perceived mix in our economy (domination of forestry, fish, agriculture, oil/energy and raw materials) both suggest that innovation is limited.

Finally, whilst Grieg, Munch, Ibsen and Knut Hamsun are famous artists, not all respondents realise they are Norwegians. In many instances, our Viking heritage is claimed as the most intriguing aspects of Norwegian culture. More importantly, as already mentioned, current day Norwegian artists and culture personalities have not achieved strong international positions in any sector – hence “*Dynamic cultural and artistic sector*” is mostly rejected.



5. Interest in 13 provided statements/stories

Respondents in most markets were provided a series of statements, or stories, that were designed to intrigue and impress. The purpose of this part of the study was to assess which stories were found most interesting. In some markets, the selection of stories was slightly different – and in others, this component of the study was not included at all. Nevertheless, those nations that participated provided a relatively clear picture. In terms of content, there is a certain overlap between these stories and the associations discussed in the previous section.

Respondent reactions to these stories should be interpreted in light of the bold wording and extensive use of superlatives chosen for this research. The wording was selected for research purposes, not for subsequent use in communications. Hence, we would caution against too literal interpretations of the results presented overleaf in fig. 2 (with the same colour coding as fig. 1 in section 4 above.) *Respondent rejection may come from lack of credibility in the wording of the story, rather than lack of interest in the subject matter.*

Green colour: Interesting, sounds right
Yellow colour: Somewhat interesting, but true?
Red colour: Not really interesting and/or not true

The 4 green coloured stories

As Synovate often find in our studies among professionals, these respondents do not distinguish clearly between their role as consumers and their professional capacity. We feel it is appropriate to consider the top 2 statements (“PERSONALITY” and “TOURIST DEST.”) in this light. This expression of interest is an indicator of the potential that Norway offers as a tourist destination to the public of these 19 countries. Opinion formers may be particularly important visitors to Norway, as their enthusiastic story-telling at home may be important signals to others in their own country while such experiences also positively influence their overall perceptions of Norway in their professional capacity.

Figure 2: Interest in 13 statements about Norway

PERSONALITY: Norwegians are a peace-loving, well educated and friendly people. They provide a great welcome for tourists as well as a pool of skilled employees for business
TOURIST DESTINATION: Norway is one of the most naturally spectacular and beautiful countries in the world. The long coastline, the fjords as well as the mountains make it an ideal place to explore
WELFARE STATE: Norway has a reputation as one of the most socially advanced welfare states. Norway has created an egalitarian, social and economic model with one of the highest growths and lowest unemployment rates in Europe
ENVIRONMENTAL LEADERSHIP: Norway is now a leader in cutting edge green energy technology such as carbon capture and storage, solar energy and offshore wind
YEAR ROUND DESTINATION: From brilliant winter skiing to fantastic summer adventure holidays, the perfect place to escape to all year round. it gives easy access to clean nature and spectacular scenery in all seasons
MARITIME NORWAY: Norway is a major maritime nation with a complete maritime cluster. Its maritime industry is well known for delivering environmentally friendly, innovative and quality services and products
INVESTING FOR THE FUTURE: Norway’s oil and gas revenue is invested abroad through the Norw. Gov’m’t Pension Fund, which owns 1% of the world’s share portfolio. The fund’s size, long term commitment and strict ethical guidelines, make Norway stand out as an attractive and socially responsible global financial actor
PETROLEUM AND POWER: Norway is the 3rd largest oil exporter in the world and a major supplier of natural gas. Today, Norway is at the forefront of oil/gas technology and exploitation of oil/gas at sea
RELIABLE QUALITY/MADE IN NORWAY: Anything made in Norway is of a high quality, from sophisticated manufactured goods to food products
CUTTING-EDGE SCIENCE/TECHNOLOGY: Norwegian sc. and techn. are at the front of their fields, one reason why Norway is host to prestigious prizes in mathematics, nanoscience, neuroscience and astrophysics
INTERNATIONAL LEADERSHIP: Norway has a history of helping to solve international disputes and achieve reconciliation in some of the most difficult conflicts
VIBRANT CULTURE/FESTIVAL CULTURE: Norway is experiencing an explosion in creative talent. With a brand new Opera House in Oslo, Norwegian art and literature are making an increasing impact on the world stage, and the country is practically “covered” with music festivals during the summer season, Norwegian culture and creativity are more exciting than ever
FOREIGN INVESTORS: Norway offers investors exceptional financial opportunities and a level playing field. With a growth rate of 3.3% in 2007 and a per capita GDP among the highest in the world, Norway is an outstanding market for international companies to do business

WELFARE STATE

The interest in this statement is stronger in nations that do not feel their own countries has managed to resolve constitutional and political issues as well as Norway seems to have – and they appear to genuinely feel it would be interesting to learn more about how Norway (and the other Scandinavian countries) organise their society.

ENVIRONMENTAL LEADERSHIP

This statement is received with considerable interest by many nations. The topic is seen by opinion formers as one of the key issues of our time, and Norway's credibility is considerable. The story may be less significant with the general public – but surely favourable. Some of Norway's Scandinavian neighbours are not that interested or impressed, however. Interestingly, this is one of the key stories that appeal strongly to opinion leaders in both the US and the UK. As we saw in the Anholt report, the public of these two nations rate Norway surprisingly poorly. Thus, we feel this story emerge as a very key aspect in building Norway's reputation.

The 6 yellow coloured stories

YEAR ROUND DESTINATION

This story rates as less interesting than TOURIST DESTINATION, since nations consider Norway in winter as too cold and its nights as too long. We know from other studies that the favourable impact of the Gulf Stream on Norwegian coastal climate is unknown to the general public outside of Scandinavia – and needs to be given more prominence in tourist promotion.

MARITIME NORWAY

This story is highly credible in all nations, but the strength of interest displayed depends on the professional background of the respondent and the importance of marine transport to the nation in question. (In the US, for example, it did not capture much interest)

This is also a story of considerable value that supports other distinctive aspects of Norwegian character and Norway as a nation.

INVESTING FOR THE FUTURE

We find interest for this story with parts of the respondent sample and some nations – but the strength of interest vary. For some nations, it is a remote issue – albeit an admirable strategy for Norway.

PETROLEUM AND POWER

The key point of this story (*“Norway is the 3rd largest oil exporter in the world”*) is taking respondents by surprise. The international importance of Norway as an exporter of oil and the implications for Norwegian wealth is making a very strong impression. On the other hand, the awareness of Norway’s gas deposits is limited.

There is a particular challenge in the combination of this story with that of ENVIRONMENTAL LEADERSHIP. To respondents who consider extraction of oil and gas as environmentally irresponsible, these two stories are incompatible – while to others their combination, if credibly achieved, is particularly impressive and very interesting indeed. The co-existence with oil and gas resources of major hydroelectric resources and our competence in this context may provide an important supplement to this story.

RELIABLE QUALITY

We have touched upon this earlier in the report. Whilst Norwegian-made products are seen to be of high quality – no one really knows any Norwegian consumer product of significance – other than our fish. Hence, it has limited general interest.

CUTTING EDGE SCIENCE/TECHNOLOGY

This is generally not seen as credible – partly due to lack of substantiation, the fact that Norway is a midget country, the large public and relatively small private sector in the Norwegian economy, and our wealth (suggesting Norwegians do not have the necessary “drive”). It does have higher credibility when related to specific fields where Norway are recognised to have strengths (environment, energy, maritime sector, fish farming, peace research) – but *there would be interest if Norway could substantiate its claim*. For example, US opinion formers rate very high on interest a slightly different wording of this statement that underlines the strong position as being primarily in certain select fields.

The 3 red coloured stores

INTERNATIONAL LEADERSHIP

Whilst Norway's efforts to promote peace and solve conflicts are seen as well intended and valuable, opinions differ as to the specific achievements of these efforts. Some praise this role and ambition without reservations, others find Norwegian peace diplomats a bit naïve and the results of these efforts insignificant. An added reason for the lack of interest is the term "leadership" – as many respondents seem to consider such a term in the context of peace negotiations to be the exclusive privilege of major nations, or states that are themselves directly involved in the conflict.

VIBRANT CULTURE

The statement is found to be over the top, particularly in view of the limited presence of Norwegian artists on the international stage.

FOREIGN INVESTORS

The very limited population size in the Norwegian market makes the country, however affluent they may be; seem relatively less interesting than so many other national markets. The additional complication of a small country currency adds to business respondent scepticism when it comes to making investments in Norway. However, importing Norwegian products may be another matter – this could be interesting, particularly in the sectors where Norway holds a strong position.

6. Awareness of famous Norwegians

As already pointed out, famous Norwegians of the past are, above all, Grieg, Ibsen, Munch, and to some extent Hamsun. However, many opinion formers were unsure of these names being Norwegian, Swedish or Danish. Other famous Norwegians of the past are Fridtjof Nansen, Roald Amundsen and Thor Heyerdahl.

Gro Harlem Brundtland is mentioned by a few respondents as an interesting illustration of

- ✚ a famous Norwegian
- ✚ Norway's pioneering role in environment protection
- ✚ the strong role of females in Norwegian society.



But the most well known Norwegian today is King Harald. The Royal Family is referred to as a disciplined, civilised and effective promoter of Norwegian interests – admired both for the lack of “pomp and circumstance” and for the closeness of the Monarch and his family to the Norwegian people.

7. Activity and commitment of Norwegian Embassies in promoting Norway

In many reports, the Norwegian Embassies are seen to be relatively anonymous and passive in the promotion of Norway, Norwegians and Norwegian industry – particularly when compared to their Scandinavian counterparts. This assessment of the activities of Norwegian embassies is part of respondent perceptions of Norway as a passive, not marketing oriented nation (This study, however, is commented upon by respondents as a promising and very appropriate indicator of change.)

2.3.3 How is the perspective of opinion formers in China, India, Brazil different?



These are remote, huge markets in fast economic development. In these countries we see very limited awareness of Norway. Their vague perceptions of Norwegians as people appear largely to be based on the geographical location of Norway (hence Norwegians are often seen as cold, reserved people). Several respondents express that they think of Norway as part of Europe or Northern Europe, due to limited awareness of how Scandinavia/The Nordic region is different from the rest of Europe.

Nevertheless, we see some fascination for Norwegian society and culture also in these countries. Among those more aware, we find an interest in ethical values, in the clear Norwegian stance against corruption, in the Nordic society model, Norwegian environment policies (which implicitly include a fascination for the cleanness of air, nature and cities) and the Norwegian philanthropic approach to developing nations - more so than interest in Norwegian industry. Future learning about the culture and the society could subsequently pave way for business and tourism development – if so, based on a broader platform than only beautiful nature.

Distance, climate and perceived cost levels makes Norway as a tourist destination somewhat less attractive – but since these countries have large groups of rich people (in absolute numbers - so in each case a very small part of the nation), we are not sure that this indication of reservation by opinion formers should be given decisive weight when planning resource allocation for the promotion of Norway as a tourist destination.

2.3.4 How is the perspective of the Russian opinion formers different?



Whilst most of what is said above about China, India and Brazil also holds true for Russia, some aspects of Russian opinion formers' perceptions of Norway necessitate a separate section on this nation. The Russian opinion former sample is the only one of the 19 to see the relationship with their country and Norway in an ambivalent light – both with interest, but also with some genuine reservations.

Top-of-mind associations: A country rich on natural resources, however seemingly introvert, and somewhat provincial (“there are never any news from this country...”). Norway is seen to exploit its natural resources effectively and sensibly, also with respect to the effects on the environment – and in this context offers interesting competence and experience to Russia.

Norwegians are somewhat reserved and quiet, yet friendly people – this impression is partly deduced from the assumed climate. (In Russia, as in most non-Nordic countries, there is very low, if any, awareness of the existence and effects of the Gulf Stream – hence the Norwegian coastal climate is assumed to be harsher and colder than it really is). Although Norway is a rich country and Norwegians live in a welfare state, Russians perceive Norwegian consumption patterns and day-to-day behaviour as quite prudent and down-to-earth – as they do for Scandinavians in general.

At least the political component of the sample see Norway as a country with conflicting interest to Russia's in a number of ways. Norwegian governments are seen to side with the US in any disagreement US vs Russia irrespective of substance matter, and of course Norway is known to be a member of NATO. Further, Norway and Russia have important conflicting views on borders and national rights in the Arctic. But Norway is *not* seen as an aggressor. As a NATO member, the country is seen to take a conservative and cautious position.

There is some awareness of Norway's peace effort (and the Nobel Peace Prize) – but this is not seen as relevant for a world power like Russia. Some respondents point to Norway's active position in Georgia's favour on Ossetia, however, suggesting that if Norway genuinely were committed to its diplomatic peace effort, it should have tried to mediate in this conflict.

Russian opinion formers are interested in Norway's potential as a tourist destination, and suggest more aggressive marketing directed at rich Russians (since Norway is seen as expensive).

As in other countries, there is very little awareness of Norwegian business and products other than salmon and oil/gas. It would appear that Russia's relatively recent openness to the western world has led to an extraordinary focus on the attractiveness of internationally recognised consumer brands – which means that the lack of such Norwegian brands may be more important in limiting Norway's reputation in Russia than in most of the other nations selected for the Reputation Improvement effort.

The extraction and transport technology for natural gas is mentioned as a particularly interesting sector for co-operation between the two countries. In those sectors in which imports of goods are realistic within the framework of internal Russian constraints for conduct of business (IT, construction, luxury goods such as cosmetics), Norway is not seen as a potent supplier.

Norway is not seen as particularly anxious to attract Russian investments and to deepen relations to Russia. Suggestions are made that visa application procedures for Russian business people are too cumbersome, that taxation of Norwegian subsidiaries is high – and that there seems to be little interest in attracting Russian graduate students to Norway.

Thor Heyerdahl is a particularly famous Norwegian – even more clearly so than in many other countries. There is some awareness of Norwegian popular music – but generally awareness of Norwegian culture is not high.

In order for artists to achieve recognition in Russia, they seem to need to be established international notorieties already, unless promotion is done in tandem with a Russian admired figurehead of the sector – thus providing legitimacy to the subject in question. (In this context, we remind the reader that the fieldwork of this research was conducted prior to the 2009 Eurovision song contest in Moscow)



2.3.5 How is the perspective of opinion formers in Germany, Netherlands, France, Italy, Germany, Poland, Spain and the UK different from the typical picture?

The overall perspective in these EU member countries is pretty much the same as that described in chapter 2.3.2. The key aspect that makes their perspective differ somewhat from the other nations, however, is how their consciousness of Norway's non-membership of the EU affects their view on Norway as a nation.

Very simply, this decision by Norway, whilst understood as economically sensible for a country rich on natural resources, is seen as an indicator of self-reliance and national independence which suggests cultural introversion and a disinterest and/or lack of need to actively trade and communicate in cultural, scientific and commercial matters with the rest of Europe.

This quite false picture is developing, not only by virtue of Norway's decision to not become a member, but in considerable part because of Norway's consequential day-to-day absence from exchanges and decision making processes with the other European countries. The understanding in EU member countries of the realities of EAA association rather than full membership is in itself poor and requires correction. But just as important is the fact that Norway's absence from EU arenas of debate means that Norway has a need and self-interest to more resolutely and generously provide information to the rest of Europe about itself, its national attributes, needs and views.

There seems to be very limited awareness of NFM (Norwegian Financing Mechanism via EAA) and of the EU projects funded by this mechanism. Such awareness would contribute towards correcting the impression that Norway is exploiting the benefits of the inner market without providing its fair share of contributions.

The impression of a somewhat traditional, rural and isolationist culture otherwise discussed in 2.3.2 also holds true for EU members, but is reinforced by the non-membership effects mentioned above.

Finally, Norway's non-participation in the EMU means that European businessmen and tourists perceive an added complication and currency risk when dealing with and visiting Norway.

2.3.6 How is the perspective of the opinion formers in the Nordic countries different?



The Nordic opinion formers emerge as considerably better informed about Norwegian matters, values and everyday life than those of other countries. Nordic countries share history and fundamental views on culture and values. This makes it easier to discuss both local and international events, and to cooperate in bilateral or Nordic projects or more global issues.

Nordic colleagues, be it in industry, science or the government bureaucracy or other fields, discuss a much broader band of issues and share views and opinions on more subjects than what seems to be the case in the relationship between Norway and other countries.

However, the isolation of Norway (and so far of Iceland) from the Nordic region by means of their non-membership in the EU has gradually caused an emerging cultural reorientation and reduced interest in Norwegian affairs and culture in Denmark, Sweden and Finland, including coverage by their national media of news from Norway. Reading between the lines of the reports, there seems to be a certain tension in the minds of Swedes and Danes in particular caused by Norway's decision to stay on the outside – although the EEA status does provide access to the EU inner market for Norway and implies the same acceptance in Norway as for EU members of all key political, social and administrative decisions by the EU. The motivation of the Norwegians for the decision to stay outside of full membership is seen by also the Nordic members as unwillingness to share their oil wealth - to allow Europe a larger influence on the management of their natural resources

The awareness of the NFM is quite limited also in the Nordic EU member countries.

To the Nordic countries, *the picture of the Norwegian* is not very different from that held by the average opinion former in the 19 countries, as discussed in 2.3.2 above.

The archetypical Norwegian is a friendly, straightforward person that loves the outdoors and likes to spend much time with his family. He is not overly ambitious, and to a large extent he is accepting and happy with life and status quo. He is honest, likeable and straightforward. He does not work too hard, but diligently, responsibly and with focus on detail. He is traditional in his values, and not particularly innovative. He is independent, self-reliant and persistent – some would say stubborn. Many would refer to him as a bit provincial.

Norwegian political efforts to maintain decentralised habitation patterns and thus to stimulate relocation of industry and government institutions to smaller towns and rural districts is seen as commendable by their Nordic brothers from an idealist perspective. Some respondents query the realism and long term sustainability of these policies, however – and feel that this policy tends to leave Norwegians in the past, thus reinforcing the Norwegian provincial streak.

The Nordic opinion formers are less impressed than are their European, Asian and American counterparts by Norway's achievements in environmental protection and in particular as regards development of alternative, sustainable energies and the reduction of green house emissions. The technology suggested by Norway on CO2 capture and storage is seen as controversial by some, and the amount of development work and extent of commitment to alternative energy is claimed to be surpassed by many other countries, including some of Norway's neighbours, in particular Denmark. The most environmentally concerned respondents express that Norway's continuing extraction of oil and natural gas and exploration in new areas does not give credence to the country's declared commitment to the environment. Clearly, Norway is rich on energy, both oil and (sustainable) hydroelectric power - but they have not (albeit understandably) really shown a lot of interest in alternative energy sources nor technology to improve the viability of these energy sources.

There is considerable interest among the Nordic opinion formers in Norway's diplomacy vis a vis Russia, and in their negotiations on unresolved issues in the High North. Finland and Iceland in particular, but also Sweden, look at Norway as being their lead in terms of how best to relate to Russia in such matters.

Both Sweden and Denmark respondents have the impression that Norwegian industry is more politicised, with a higher ownership and involvement by the Government, and more extensive controls on foreign investments and imports - particularly those protecting Norwegian agriculture. They also perceive a more troubled relationship government-industry than they experience themselves in their own countries

They are concerned that Norway's oil industry attracts most human and capital resources of the country – thus leaving the onshore industry struggling in the competition. They see the long term effect of this as a potentially unbalanced Norwegian industry, and a vulnerable composition of industrial sectors in the longer view.

They are not particularly keen to invest in Norway – for geographical and cost reasons combined with the limited size of the market – but welcome investments by Norwegian companies in their own countries. They also see that in the current economic crisis, Norway provides welcome unemployment relief to their young countrymen.

Among the Nordic opinion formers, there is increasing concern about the political stability in Norway, caused by the increasing influence of Fremskrittspartiet – which they see as an opportunist political party exploiting Norwegian xenophobia – and appealing to Norway's most provincial voters.

It is interesting and concerning, as a sobering point vis a vis the many positive comments about Norwegians and Norway, that the city of Oslo attracts some negative comment from a few Nordic opinion formers based on their personal observation of both filth and littering and extensive drugs and prostitution trafficking in its streets.

2.3.7 Some perceptions special to opinion formers in the US, Canada, Turkey and Japan



USA

Overall positive impressions, but indications that Norway is seen as more rural and provincial – offering very limited cultural attractions, and cold climate and high cost levels being constraining factors for tourists. Eco-friendliness is a key attraction, particularly in view of its extensive oil and gas resources. There is very little knowledge about what Norway offers in terms of industry outside of fish and oil/gas – and clear scepticism to the large involvement of Norwegian government in industry (thought to represent a barrier to innovation and to international investment opportunities). Perceptions of rural economy, lack of urban culture.

Canada

There are many similarities between Canada and Norway (northern location, scenery, climate, importance of oil, gas and forestry etc) Canadians are more aware of Norwegians' winter sports achievements, and accept Norway's political and social direction more readily than their southern colleagues (i.e. the US). The report suggests potential for increased exchange both in areas of scientific research, business development and tourism.

Turkey

Turkey opinion formers express a more favourable perception of Norway and Norwegians than what the Turkish population express in the Anholt study. Norway's welfare society and its handling of oil resources (balanced, sustainable extraction, and establishment of government owned pension fund) is looked at with interest. Norwegian boldness and independence admired (2. world war, NATO membership, non-EU member), but its ambitions in aiding other parts of the world in achieving peace is seen as naïve. Opinion formers express that Norway as a nation needs to have a diplomatic and business presence in Istanbul, not only Ankara.

Japan

The report from Japan is only based on 3 depth interviews and one focus group of 7 participants – clearly the weakest base for conclusions about perceptions by national opinion formers of Norway. These respondents tend to see Norwegians as passive, not marketing-oriented but honest people. They are conscious of its beautiful nature and a highly developed care for the environment. The country is seen as isolationist both from a business perspective, culturally and in terms of tourism promotion.

2.4. Analysis summary - Norway's reputation

Strengths and Weaknesses below represent a summary of perceptions identified in the research reports. Opportunities and Challenges, on the other hand, are partly identified in the research, and partly identified in Norwegian society today through other sources. This list of Opportunities and Challenges may not be exhaustive.

Perceived reputation strengths:

Beautiful and versatile nature
Energy resources and technology
High standard of living
Egalitarian welfare society
High English language literacy
Norwegians recognised as ethical, non-corrupt, and likeable
Recognised standards of education, health and scientific research
Accepted leading positions in

- + Environmental conservation and protection
- + Fish farming
- + Maritime sector

Competence in peace research and diplomacy
High foreign aid contributions
Peace and human rights advocate

Opportunities for reputation improvement:

Nature and tourism infrastructure well suited for active nature holidays
Comfortable popular access to the Arctic
Gulf Stream awareness would reduce tourist fears of harsh climate
Government decision to centrally stimulate national reputation effort
Global awareness and interest in Norway's history as seafarers and explorers may counteract impression of isolationist nation
Norwegian Royal Family seen as national asset
Stream of talents in different arenas of arts and culture suited for increased exposure internationally
Eurovision Song contest win '09 – 2010 contest in Oslo
Competence also in other niche sectors (although not known), such as cancer and bio-marine research
Norwegian chefs regularly collect prestigious international wins in gastronomy
Considerable international interest in exchange programs with Norway in science and culture

Perceived reputation weaknesses:

Lack of international media interest
Da/Swe/Finnish media increasingly directing attention towards Europe
Remote location and non-EU membership isolate nation
Lack of int'l consumer brands indicate primary industry dominance
Small population seen as indicator of limited int'l importance
Expensive, dark and cold for tourists
Norwegian nature tends to be seen as most suitable for passive observation by mature age cruise passengers
National currency limits development of investment, trade and tourism
High state ownership of industry and government policies seen to constrain free conduct of business (by some countries only)
Embassies seen as passive or uninvolved in promotional efforts
Limited awareness of contemporary culture, design, architecture

Challenges for reputation improvement:

Global perceptions of Scandinavia as one
Although positive overall perceptions, undercurrent of scepticism:

- + a bit rural rather than urban
- + a bit follower rather than initiator
- + provincial isolationist rather than open-minded, creative and int'l

Non-membership of EU creating a picture of Norway as self-reliant nation unwilling to share resources
Oil exploration undermines image as environment conservationist
Publics do not identify strengths in commodities & professional sectors
No awareness of favourable impact of Gulf Stream on climate
Global community rejects hunting of whales
Wealth + size and homogeneity of population seen to make house holding of nation easy, able to address issues other nations can't
Nordic neighbours do not agree to leading position in environment protection

3. How to improve Norway's reputation

3.1 Broad vs. selective strategies

The Foreign Ministry is currently planning to divide the 19 prioritised countries into two groups:

- ✚ those where Norway and Norwegians already enjoy a strong reputation
- ✚ nations in which Norway has a vague reputation and/or where reaching a broad public audience is seen as particularly challenging.

The Ministry is considering pursuing a broad strategy of reaching a wide audience in the first group of countries, and a more selective strategy targeting carefully selected audiences in the second group of countries.

BROAD STRATEGY TOWARDS:

- ✚ Denmark
- ✚ Sweden
- ✚ Finland
- ✚ Iceland
- ✚ Netherlands
- ✚ Germany
- ✚ Poland
- ✚ France
- ✚ Italy

SELECTIVE STRATEGY TOWARDS:

- ✚ Spain
- ✚ USA
- ✚ UK
- ✚ Russia
- ✚ Canada
- ✚ India
- ✚ China
- ✚ Brasil
- ✚ Japan
- ✚ Turkey

3.2 Main lessons in regards to the task of improving Norway's reputation abroad

A 2008 report from the Foreign Ministry to the Reputation Forum suggests and explains the appropriateness of “*Resourceful, Committed and Reliable Partner*” as the desired position and the recommended attributes of Norway as a nation. Any promotional or communication effort aiming to influence Norway's reputation should support and reinforce perceptions abroad of Norway along these attributes.

As seen from the analysis in the previous chapter, these desired attributes are reflected in the picture of Norway for most of the 19 nations *to a reasonable - but only reasonable - extent*

There are some important reservations and limitations:

✚ *Resourcefulness* is seen as true for Norwegian nature – but not to the same extent for the Norwegian people.

There are considerable question marks in regards the perceived resourcefulness of Norwegians, in particular as regards their inventiveness. Norwegians are seen by some as a bit slow, the Japanese say “lazy”, others say “fat and happy”, and further as *poor marketers* (this assessment derives primarily from lack of evidence of the contrary – lack of news stories, lack of known international Norwegian consumer product brands) . Norwegian scientists may be on par with those of other nations, but are not seen as particularly innovative. No contemporary artists stand out as startling and renowned personalities, either – so the assumption is that Norway does not have much to show in terms of contemporary culture. In fact, had Norway offered renowned contemporary artists in the fields of music, literature, film, visual arts – this could have compensated for the complete lack of impressions abroad from branded Norwegian consumer products .

✚ *Commitment is not all that red hot, either*

Whilst Norway is seen as an idealist country in many ways, the country is also seen as isolationist and Norwegians as self-reliant traditionalists that are not very keen to engage in exchange with others. This may be false and probably is a view of Norwegians from a narrow angle, but it clearly is a perception undesirable to constructive and mutually rewarding relationships with people and parties from other countries.

✚ However, Norway and Norwegians are clearly and unquestionably seen as *reliable*, and Norwegians as likeable (by those that have met Norwegians)

Given the limited awareness of Norwegians and Norway as a nation, the lack of media interest, its remote location and the small size of its population, it seems clear that

- ✚ *Norway's reputation improvement effort must involve use of considerable communication resources over a long period of time in order to make a significant difference*
- ✚ *communication content must build on and reinforce already existing perceptions for maximum effectiveness (since the changing of existing attitudes is a much more difficult and demanding task than reinforcing and deepening existing ones)*

3.3. Key recommendations and possibilities for communications

We will shortly discuss important perceptions of strengths emerging from the research that would help meet the ambitions of the project. However, first there is a need to pinpoint a supplementary perspective with immediate relevance to how one may better achieve the ambition of positioning Norway as a resourceful, committed and reliable partner.

Statements displaying Norway as a *leader* on the world scene *are rejected out of hand*, not the least due to the country's small size. Whilst these statements, as mentioned earlier, were not intended for communications – the strength in these rejections provide guidance to the thinking about how a small nation may most effectively make an impression on other nations

Norwegian peace efforts anywhere, environmental contributions in whatever field, the Norwegian version of the Nordic model of welfare societies, the study of political science in Norway, doing business with Norwegians, or for that matter, spending one's holiday in Norway, may all credibly be seen as *inspirational experiences*

Thus

- ✚ when Norwegians tell their stories
- ✚ when Norwegians relate to and interact with foreign individuals
- ✚ when the Norwegian government communicate with other governments
- ✚ when Norwegian companies and organisations deal with their international peers,

they need to be mindful that

NORWAY'S ROLE AS A SMALL, BUT RESOURCEFUL NATION SHOULD BE TO INSPIRE (rather than lead).

Norway and Norwegians should aim to offer experiences that are enriching and enabling to others/other parties, that inspire thought, provide learning and intellectual, spiritual and physical stimulus

In this way, Norwegian partnership value would be augmented, and international performance by Norwegians would be seen as more appropriate and attractive.

The above learning is pertinent not as much to the content of communications, but rather to style, tone and form, and to aspired relationships and roles.

On the following pages, Synovate would like to propose some key points about Norway and Norwegians that the Foreign Ministry and Innovation Norway may want to consider in its future messaging development.

The data strongly suggest that the following perspectives about Norway and Norwegians will help alleviate misconceptions, reinforce positive messages and provide a credible base for other, secondary claims.

PERSPECTIVE 1: The natural hunger of seafarers for discovery and sustainability

- ✚ By necessity for population survival, Norway's location (to the North Sea and in the Arctic) and its extensive coastline has created a nation of seafarers with
 - an urge for exploration and discovery
 - an instinctive understanding of the need for balance and sustainability in management of their natural resources.
- ✚ The early demonstration of this national character was in Norway's Viking past – when Norwegians explored remote shores (exemplified by Sigurd Jorsalfar and Leiv Erikson)
- ✚ It was further exhibited by
 - the global marine explorations and scientific research of Fridtjof Nansen, Roald Amundsen and Thor Heyerdahl
 - the tremendous growth and leading position of Norway's merchant marine over the last two centuries.
- ✚ Today, it is demonstrated by
 - Norway's responsible exploitation of marine resources in the North and Barents Seas - whether of oil & gas, fish or other marine resources
 - its development of cutting edge technology for this exploitation
 - the pursuit of renewable energy resources – hydro-electric, wind-based and others
 - Norway's protection of Arctic wildlife and other natural resources at sea and on land

The importance of this perspective is that it

- ✚ *is based on the only cultural heritage generally known (and indeed seen as fascinating) abroad about Norway*
- ✚ *uses some of the most well known and admired Norwegians through history as support for the argument*
- ✚ *counteracts perceptions of an isolationist and provincial culture*

- ✚ *underlines the national thirst for discovery (and thus for innovation) and demonstrates the skills of Norwegian engineers and the close cooperation between industry and some of our scientific institutions*
- ✚ *illustrates the resourcefulness required when living under demanding conditions (thus fights perceptions of laziness)*
- ✚ *illustrates how livelihood dependence on natural resources enforces respect for nature and thus for management of sustainability and development of appropriate technology*

This perspective would naturally inspire further interesting aspects about Norwegian industry and competence in the marine and maritime clusters – shipping, oil and gas explorations, deep sea technology, sustainable fish farming, and environmental research in the Arctic etc.

One such aspect flowing from the Norwegian explorer tradition would be:

PERSPECTIVE 1B: The deep sea exploration analogy to US space technology

Technology originally developed for Norway's environmentally friendly deep sea exploration and production has subsequently lead to valuable breakthroughs in brain- and neurosurgery, and to innovations of great pharmaceutical value, for example in cancer fighting medication. (Just as US space technology has resulted in many secondary scientific applications of great value to mankind.)

This exciting aspect (allowing use of the analogy between US space research and Norwegian deep-sea technology) could be used as a starting point to demonstrate the scope and skill and innovative abilities of leading Norwegian scientists in a number of other areas – and how this inspires development of advanced industrial activity. Providing inspirational stories about breakthrough research and innovations by Norwegian scientists would counter a number of the perceived weaknesses in Norway's reputation.

However, the challenges emerging from the research to the achievement of the desired picture of Norway and Norwegians require supplementary stories to be added: The research suggests the following supplementary perspectives as suitable:

PERSPECTIVE 2:

How nature's demands (Arctic location, topography and climate) have assisted development of an egalitarian welfare society

✚ Norway is a large and mountainous country with a very extensive coastline. It is populated by few, and located far in the north. These fundamental conditions have created a society acutely aware of the need for cohesion and mutual support among inhabitants. This is probably why Norway may be the one among the Scandinavian nations which has fostered the most egalitarian culture and the closest cooperation between industrial parties that elsewhere are seen to have opposing interests. This may also be why Norwegians have found it useful to allow its democratically elected governments to build social infrastructure for all citizens such as health and education services and extensive social support systems. Today, due to environmentally sensitive management of their natural resources and inventive technology in exploiting these resources, Norwegians enjoy one of the highest living standards in the world. This fact enables the Norwegian government to set aside substantial funds for a national pension fund, which will protect the egalitarian welfare state in generations to come. Also, their experience as a nation in terms of the benefits of an egalitarian democratic society may be why Norwegians today contribute a significant part of their wealth towards peace between nations and the aid of needy inhabitants of poorer nations.

This perspective focuses on the egalitarian welfare society as the core Norwegian aspect of the Nordic model – and claims that it is rooted in the demands from Norway's nature and location. Peace activity and solidarity to the needy in other countries, pension fund and equality of genders are seen as interesting and logical aspects of this fundamental value. It is intended to reinforce perception of the values Commitment and Reliability.

PERSPECTIVE 3: About nature as a source of inspiration and balance to modern urban life - intended to attract tourists, students and scientists

✚ Whilst Norway is mostly known for its majestically beautiful fjords and coastline (a major part of which is located in the Arctic) – which many tourists (seen to be elderly) enjoy safely from the deck of a cruise ship, a less known but equally important aspect of Norwegian nature is its ease of access to the public.

- ✚ This perspective could explain the dramatically favourable impact of the Gulf stream on the day to day lives of Norwegians when compared to the much harsher conditions experienced by Russians and by US Alaskans that live equally far north – thus making the Arctic more comfortably accessible in Norway than elsewhere (this would also accentuate Norway’s interest in protecting the environment, due to the publicised vulnerability of the Gulf Stream)
- ✚ It could further document Norway’s extensive national parks, explain the rights of access by the public on privately owned land and the unique infrastructure facilities of the Norwegian Trekking Association (DNT) across the vast country
- ✚ These issues would illustrate the suitability of Norwegian nature for active experiences in beautiful and dramatic surroundings (such as kayaking, hiking, cycling, rafting, fishing)
- ✚ It could also present how Norwegian nature is used by its population as arena for both cultural and social activities, how tomorrow’s Norwegian athletes use nature actively from early age, how nature is used by Norwegians in general as recreation and for life balance purposes, how large national parks surround Norway’s 3 largest cities Oslo, Bergen and Trondheim to provide a balanced life even to the urbanites.

PERSPECTIVE 4: The paradox of a stable and well functioning constitutional monarchy in a modern democracy

✚ Whilst Norway is recognised as a stable and egalitarian democracy, it is also a constitutional monarchy. This is seen by some as a paradox. A closer look at the role and performance of the Norwegian royal family in Norwegian society may explain why the monarchy strongly defends its place in Norwegian society.

This perspective could explain the role of the monarch in times of national crisis by providing the story of Haakon during the 2nd world war and link Norwegian's naval exploration to the naval sports achievements of Olav and his son Harald. It could further focus on the closeness of the Royal family to the lives of the Norwegian public (to underline the egalitarianism of Norwegian society) and the very active engagement of the Royal Family in important global value issues.

✚ The story of the Norwegian monarchy has very broad appeal and may gain considerable media interest – but may in itself not be directly crucial in reinforcing the key values of the RI ambitions. However, by creating attention and interest, it can lead to other learning.

PERSPECTIVE 5: The link between Norway's dramatic nature and its nourishment of past and contemporary visual and performing artists, writers, musicians and architects

✚ Norway's attractive nature may overshadow the fact that the country also offers exciting cultural and art experiences. Ironically, it is in many ways that same powerful scenery and climate and its Arctic location which so fascinate tourists today, that are indeed among some of the key reasons why Norway fostered cultural giants such as Ibsen, Grieg, Munch and Hamsun. These world names now see the emergence of new contemporary talents in all fields of musical, visual and stage arts and literature - with examples such as Jon Fosse, Jan Garbarek, The Oslo Philharmonic Orchestra, Aha and others. Attractive new and more established arenas - both indoor and open-air (The Norwegian Opera to be mentioned) - are available for their exposure to interested tourists in Norway (but may also be enjoyed on international stages).

✚ This story about Norwegian contemporary culture is important in order to create a picture of a modern and sophisticated nation. It is almost as important to ensure that Ibsen, Grieg, Munch and Hamsun are understood to be Norwegians as it is to provide arenas for contemporary Norwegian artists to gain global recognition – so that there are specific concrete and observable names able to keep the national identity visible. Care should be taken in assessing and using candidate names for contemporary artists for promotional purposes in stories like these.

PERSPECTIVE 6: How superior quality foods from Norwegian nature help Norwegian chefs collect more gastronomic awards than other nations

- ✚ Contrary to the popular perception that Norwegian staple diet is potatoes and minced fish in white sauce, Norwegian gourmet chefs have won more international gastronomy awards than those of any other nation during the last 10 years. This is due not only to the unquestionable talent and interest, but also to the quality of prime Norwegian Atlantic fish thriving in the cold Atlantic waters, red meat from small Norwegian mountain farms and cold climate vegetable produce and berries providing taste and freshness second to none.

It is important that each perspective (as this) has a point of departure that may be recognised as uniquely true about Norway – such as our climate, history, location etc. In so doing, it helps make the communication credible.

Over and above these perplexing perspectives (and others), Norway needs to provide concrete arenas for awareness building. These arenas ought to be visible in the day-to-day lives of (at least) the better informed sectors of society in the prioritised countries – since we are unable to provide Norwegian consumer brands that would otherwise perform this task. The specific aspects of these arenas fall outside of the scope of this project.

- ✚ However, it seems appropriate to observe that embassies and Innovation Norway offices need to create and actively brand and promote one or more locations in each country – digital and/or actual (preferably both) - where impressions of and topical news from Norway are expressed at regular intervals - for business, cultural and political exchanges, and suited to attract the interest of the local media

3.4 How to proceed with planning of Norway's reputation improvement effort

The Norwegian embassies in the UK (selective strategy) and Poland (broad strategy), in close cooperation with the local offices of Innovation Norway, have prepared and implemented RI plans for 2009 – as pilot markets for the Reputation Improvement effort. Based on this experience and the insight documented in this report, embassies in all 19 countries will shortly commence their planning for their local RI effort for 2010.

Each embassy (in coordination with local Innovation Norway officers) will be planning improvement activities in their respective area – based on available research locally and directions from the Foreign Ministry and Innovation Norway in Oslo. The Foreign Ministry is preparing RI plans for the Industrial, Cultural and Political sectors – and in concert with the Ministry, Innovation Norway, a key instrument in promoting Norway abroad, will provide a dedicated national plan for RI activities for each of its 9 sectors (Oil and gas, Maritime, Marine, Tourism, ICT, Healthcare, Agriculture, Energy and the environment, The culture and entertainment industries).

These centrally planned activities will form part of the input for each embassy in their respective planning work.

We suggest a few points of guidance emerging from the research or constituting sensible professional communications planning practice:

- ✚ It would help the general quality and realism and make the planning process more efficient if some 2010 plan cases were developed first as illustrating examples to the other planning units – say for Poland and for UK as sample markets for the broad and selective strategies respectively, and for one central Innovation Norway sector – say Culture
- ✚ The Ministry and Innovation Norway may also provide templates to all planning units to ensure uniformity of plan structure

- ✚ A fundamental rule when planning communication efforts is for the planning body to make an effort to “step into the shoes” of the target group – in order to ensure that the message is developed also from the perspective of the target group, rather than merely from the perspective of the communicator. This means, for example, that culture, values, traditions and the way of life of the nation for which the plan is prepared, must be borne in mind and reflected in the formulation of the plan and the resulting communication efforts. What is interesting information for the receiver and in which form would it be received with most interest and enthusiasm? (Rather than “what do we want to say?” and how would we feel comfortable expressing it?” It is important to study and contemplate these issues before formulating the plan. Common traits between Norway and the nation in question are also important to consider, in order enhancing perceptions of cultural familiarity.
 - The conclusion in this report that words such as “world leading” should not be part of any message from a small nation to a much larger nation is a result of such thinking.
- ✚ The selection and prioritisation of target groups may need to be modified from country to country – depending on accessibility and cost of communication activities – and assumed receptiveness and interest.
- ✚ Use of pictures and sound, depiction of active, friendly people and use of specific examples for illustration purposes are other basic rules. Do not talk abstracts and issue general claims, be specific.
- ✚ Although emotive messages are always stronger than purely academic ones, selective strategy markets will require less emotive language than messages aiming at the general public in broad strategy markets

3.5 Accountability measures

We believe it would provide a disciplining perspective of accountability to the Reputation Improvement effort, and increase its effectiveness, if

- ✚ specific *indicator variables of achievement* were defined
- ✚ *achievement targets* were chosen for these variables on an annual basis
- ✚ regular *achievement measurements* were implemented as a mechanism of effectiveness control and input for future planning and calibration of effort.

Such accountability measures would need to be formulated at a central level (i.e. in the Foreign Ministry), and implemented in the same way in each country, so that local measurements of achievement may be compared and cumulated to a total average.

Achievement targets for selected indicator variables should be set each year, and then measured at a defined time according to a central planning calendar to be established by the Foreign Ministry. In addition to the centrally chosen indicators, specific supplementary indicators of local importance would need to be considered and defined in each country to reflect local conditions and thus ensure local relevance of the effort.

The market research analysed and reported in this document would be a suitable starting point for selection of indicator variables at the central level. Individual reports from each country and other local research should be studied in greater detail for selection of supplementary local indicators.

Country	Fieldwork period	Method & sample size	Research agency	Suitability for comp. analysis
Japan	12/07-02/08	1 Focus Group (n=7) + 3 Depth Interviews	Burson-Marsteller	Inadequate to poor
India	08/08	2 Focus Groups (FG) (n=16)	Prof C.B. Pattanayak	Poor
China	11/08-12/08	22 Depth Interviews (DI)	A.C.Nielsen. Part Synovate guide	Fair
Turkey	11/08-12/08	23 DIs	Synovate	Good
Russia	11/08-12/08	25 DIs	Synovate	Good
Brazil	11/08	25 DIs	Synovate	Good
Canada	02/09	28 DIs	Synovate	Good
US	12/08	25 DIs (telephone)	Synovate	Good
UK	07/08	29 DIs	PSB Associates	Fair
Spain	11/08-12/08	25 DIs	Synovate	Good
France	12/08	25 DIs	Synovate	Good
Italy	01/09	25 DIs F2F or by phone (ages 20-40)	Synovate	Good
Netherlands	02/09	20 DIs F2F/ph (ages 20-40)	Synovate, guide modified	Poor to fair
Poland	11/08-12/08	58 DIs, mostly F2F	Weber Shandwick	Poor to fair
Germany	11/08	25 DIs, 2/3 F2F, 1/3 ph	Synovate	Fair
Iceland	12/08	3 brief FGs (n=22)	Capacent Gallup	Poor
Finland	01/09	25 DIs	Taloustutkimus Synovate guide	Good
Denmark	09/08	25 DIs	Synovate, guide mod	Fair
Sweden	02/08	25 DIs	Burson-Marsteller	Poor

APPENDIX:

Overview of the 19 qualitative studies among opinion formers

As mentioned in the main body of the report, the primary purpose of these qualitative studies was to benefit local embassies and Innovation Norway offices in their activity planning. For future projects of a similar nature, however, we recommend that a single research agency be commissioned to coordinate the project across all markets – ensuring comparability and adequate professional standards and reporting. To achieve this, local adaptations in methodology and reporting should be addressed and cleared with the coordinating agency.