

“MADE IN” ILI “MADE BY” U GLOBALNOJ EKONOMIJI - ŠTA JE RJEŠENJE ZA NACIONALNU EKONOMIJU I IZVOZNO BRENDIRANJE?

“MADE IN” OR “MADE BY” IN GLOBAL ECONOMY - WHAT IS SOLUTION FOR NATIONAL ECONOMY AND EXPORT BRANDING?

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REZIME

Proces globalizacije je otvorio čitav niz pitanja u modernoj ekonomskoj nauci i praksi. Otvorena pitanja zahtijevaju jasne odgovore i odgovarajuće akcije kako bi se mogli prilagoditi novom okruženju koje je određeno globalizacijom. Cilj ovog rada je da da odgovore na pitanja: Koliko ima smisla nacionalno brendiranje u uslovima globalizacije i međunarodne vertikalne proizvodne integracije? Na osnovu istraživanja nameće se potreba za pažljivijim vođenjem spoljnotrgovinske politike od strane vlade, a, posebno, u kreiranju nacionalnih brendova i podršci pri izvoznom brendiranju. Novo okruženje zahtijeva novi pristup u upravljanju nacionalnim brendovima. Pažljivom kombinacijom dva koncepta (“Made in” i “Made by”) obezbjeđuje se dovoljno prostora za izvozno brendiranje. Glavni problem je kako podržati sektor preradivačke industrije i kako kombinovati privatne i nacionalne brendove?

Ključne riječi: nacionalni brendovi, izvozno brendiranje, globalizacija, trgovinska politika.

UVOD

Koliko puta smo kupili proizvod o kome smo imali nedovoljno informacija samo zbog oznake *made in*, ili koliko puta smo odustali od kupovine zbog pomenutih oznaka, a sve na bazi našeg subjektivnog stava o zemlji porijekla proizvoda. Situacija je slična i kod privatnih brendova, a, naročito, kod proizvoda koje kupujemo prvi put. U

SUMMARY

Process of globalization opened a large number of issues in modern economic science and practice. Opened questions require clear answers and appropriate response in order to be able to adapt to the new environment defined by globalization. The aim of this paper is to provide an answer to the question: How much is the national branding meaningful in terms of globalization and international vertical integration of production? From the results of research performed is a need for careful management of foreign trade policy of the government, and especially in creating and supporting of national export branding. New environment requires a new approach to managing national brands. Careful combination of two concepts (“Made in” and “Made by”) provides enough space for export branding. Main problem is how to support manufacturing sector, how to combine private and national brands?

Keywords: national brands, export branding, globalization, trade policy

INTRODUCTION

How many times have we bought a product that we do not have enough information about only on basis label “Made in”, or how many times we gave up buying because of these labels, all based on our subjective view on the country of origin of the product. The situation is similar for private labels, especially for products that we buy

većini slučajeva ćemo se opredijeliti za proizvode sa brendom za koji imamo formiran stav ne ulazeći u pažljiviju analizu ponude. Kombinovanjem privatnog i nacionalnog brenda naše opredjeljenje za određeni proizvod postaje jače. Odluka o kupovini nije donijeta na osnovu naše objektivne spoznaje o bitnim karakteristikama proizvoda, već na osnovu našeg subjektivnog stava prema zemlji porijekla ili pak stava o privatnom brendu. Naravno, naše opredjeljenje za određeni brend može biti zasnovano i na prethodnom pozitivnom ili negativnom iskustvu sa proizvodima. U daljoj analizi problema fokus ćemo primarno zadržati na nacionalnim brendovima.

Kako bismo ilustrovali suštinu problema, poslužićemo se sa nekoliko hipotetičkih primjera:

1. Odlučili smo se za kupovinu feta sira. Pošto se radi o proizvodu sa zaštićenim geografskim porijeklom, mogli smo da kupimo feta sir nekog grčkog proizvođača, ili njegovu kopiju od proizvođača iz drugih zemalja pod drugim nazivom, ali naše opredjeljenje je da kupimo fetu. Da li je ta feta grčka? Evidentno je da je proizvedena u Grčkoj, pošto se radi o zaštićenom geografskom porijeklu. U kontekstu globalne ekonomije, moguće je da je sir proizveden od mlijeka u prahu koje je uvezeno iz Danske. Ako tome dodamo i činjenicu da je navedeni sir proizveden u pogonima multinacionalne kompanije „MEGGLE“, onda se postavlja pitanje u kojoj mjeri taj sir može nositi oznaku „made in Greece“? Možemo zaključiti da je taj sir grčki samo onim dijelom kolika je proporcionalna vrijednost angažovanog grčkog rada u vrijednosti finalnog proizvoda. Najrealnije bi bilo da kupljena feta može da nosi oznaku „made by Meggle“ ili „made by x capital“. Ko ima najveću korist od upotrebe brenda feta?
2. Kupujemo deterdžent za pranje rublja i naša odluka je Henkelov „Persil“. Takvu odluku smo donijeli na osnovu našeg uvjerenja da Henkel obezbjeđuje vrhunski kvalitet. Oznaka zemlje porijekla,

for the first time. In most cases, we will opt for products with the brand for which we have a position on the issue without going to analyze offer carefully. By combining private and national brands our commitment for specific product gets stronger. The decision to buy is made on the basis of our objective knowledge of the essential characteristics of the product, but based on our subjective attitude towards the country of origin or the attitude of the private brand. Of course, our commitment to a brand can be based on the previous positive or negative experience with the products. For further analysis of the problem we will primarily keep focus on the national brands.

To illustrate the essence of the problem we will use a few hypothetical examples:

1. We decided to buy Feta cheese. Since it is a product with protected geographical origin we could buy Feta cheese from Greek producers, or copy of the manufacturers of other countries under different name, but our commitment is to buy Feta. Is Feta Greek? There is evident that it is produced in Greece, as protected geographical origin. In the context of the global economy, it is possible that cheese is made from milk powder that was imported from Denmark. If we add the fact that the aforementioned cheese is produced in the plants of multinational companies „MEGGLE,“ then the question is to what extent the cheese can be labeled „made in Greece“? We can conclude it is Greek cheese only in level of value engaged work in final product. The most realistic would be Feta cheese can be labeled „made by Meggle“ or „made by x capital“. Who has the greatest benefit from the use of brand Feta?
2. We bought laundry detergent and our decision was Henkel „Persil“. We made such decision based on our belief that Henkel provides superior quality. Label the country of

tj. „made in Serbia“ nam nije bila ni od kakve važnosti pošto je naše povjerenje u Henkel potpuno. U ovom primjeru imamo da je privatni brend, tj. „Henkel“ mnogo jači od nacionalnog označavanja, tj. u ovakvom slučaju nacionalno označavanje nema nikakav smisao u kontekstu podrške privatnom brendu. „Persil“ je proizveden u Srbiji uz upotrebu sirovina iz Henkelovih postrojenja širom svijeta. Takođe, znanje ugrađeno u „Persil“ nije rezultat srpskog razvoja, nego njemačkog. Najvažniji proizvodni faktor kapital nije srpskog porijekla. Sumirajući ove činjenice, ne možemo reći da je „Persil“ proizveden u Henkelovim pogonima u Srbiji, srpski proizvod. „Persil“ je „made by Henkel“.

3. Donijeli smo odluku da kupimo računar IBM kupujući američki kvalitet i prestižnu tehnologiju, a ne računar sa brendom kineske kompanije, mada drugi ima značajno nižu cijenu i raspolaže sa boljim performansama. Međutim, i jedan i drugi računar nose oznaku „made in China“. Ako detaljnije analiziramo ovu situaciju, onda ćemo uvidjeti da su oba računara razvijena u silikonskoj dolini u USA, sklapaju se u istim proizvodnim postrojenjima u Kini, uz korištenje uvoznih komponenti od istih proizvođača iz Japana, Južne Koreje i Tajvana. Razlika između ova dva računara je u tržišnoj vrijednosti privatnog Brenda, a što se reflektuje na maloprodajnu cijenu. Koji je od ova dva računara više kineski ili više američki?
4. Opredijelili smo se za ljetovanje u Turskoj u hotelu sa vrhunskom uslugom. Naravno, hotel je lociran u Turskoj na truskim plažama, ali je vlasnik hotela francuska kompanija. U hotelu se služe hrana i piće čije je porijeklo iz evropskih država i to primarno iz zemalja EU. Najveći dio opreme u hotelu je evropskog porijekla. Kupili smo tursku destinaciju za odmor, ali smo u maloj mjeri dobili tursku uslugu.

origin ie. “Made in Serbia” has not been of no importance because our confidence in the Henkel brand. In this example, we have a brand that is private. The national mark has no any importance in the context of supporting the private brand. “Persil” is made in Serbia, with the use of raw materials from Henkel plants worldwide. Also, the knowledge embedded in the “Persil” is not the result of Serbian development, but German. The most significant factor of production is capital that is not Serbian. Summarizing these facts, we cannot say that “Persil” is produced by Henkel in Serbia, Serbian product. “Persil” is “made by Henkel.”

3. We made decision to buy IBM PC buying American quality and prestigious technology and not a computer brand with Chinese companies, while the other has much lower price and has better performance. However, both computers are labeled “made in China”. If we analyze further this situation, we will see that both computers were developed in Silicon Valley in the USA, assembled in the same manufacturing facilities in China, with use of imported components from the same manufacturer from Japan, South Korea and Taiwan. The difference between two computers in the market is value of private brands, and that is reflected in the retail price. Which of these two computers are more Chinese or more American?
4. We are committed to holidays in Turkey at the hotel with top service. Of course, the hotel is located at Turkey beaches, but the owner of the hotel is French company. The hotel serves food and drink, which originate from European countries and particularly from the EU. Most of the equipment in hotel is European origin. We bought Turkish holiday destination, but we got small degree of Turkish service.

Ovakvih kontroverznih primjera bi smo mogli navesti još mnogo, ali je cilj bio da se ilustruje kompleksnost problema sa kojim se suočavamo u nacionalnom brendiranju. Nacionalni brend je višedimenzionalna kategorija koja se ne ograničava samo na izvoz proizvoda i usluga. Poznato je da se on kreira i koristi u svrhu promovisanja zemlje kao investicione destinacije, ali i za promovisanje nacionalne kulture. Vrlo često se kreiraju privatni brendovi koji svojim semantičkim izrazom ukazuju na zemlju porijekla, stvarajući logičku vezu između proizvoda i imidža zemlje. Zabilježeni su slučajevi da su kompanije van Italije koristile italijanske nazive kako bi kupca asociirali na prestižan italijanski dizajn, mada u suštini nemaju nikakvu vezu sa Italijom. Takođe, postoje slučajevi asociiranja na Japan (savremena elektronska tehnologija), na Njemačku (visok nivo kvaliteta), itd. Prije nego što pristupimo daljoj analizi, dajemo nekoliko osnovnih napomena o brendu, nacionalnom brendu i nacionalnom imidžu. Domen našeg razmatranja je nacionalno brendiranje u kontekstu promocije izvoza proizvoda i usluga. U prethodnim hipotetičkim primjerima poistovjećeno je nacionalno označavanje sa nacionalnim brendiranjem, a ovakav pristup je zadržan i u daljem tekstu. Razlog poistovjećivanja je u tome što nacionalno brendiranje razmatramo u kontekstu promovisanja izvoza. Nacionalno označavanje je dobrovoljna aktivnost i ono nam daje jasnu informaciju o porijeklu robe. Označavanjem se jasno ukazuje na nacionalno porijeklo robe, a, istovremeno, se uspostavlja veza sa nacionalnim brendom ili brendovima.

NACIONALNI IMIDŽ I NACIONALNI BREND

Imidž zemlje je kompleksna kategorija čija adekvatna izgradnja zahtijeva dobro planirane, osmišljene i koordinisane aktivnosti. Problem mjerenja imidža zemlje se rješava rangiranjem, tako da danas imamo nekoliko ranglisti koje daju različite rezultate u rejtingu zemlje. Pomenućemo dvije rangliste:

Such controversial examples might indicate there is still much, but the goal was to illustrate the complexity of the problems we face in the national branding. National brand is multidimensional category, which is not limited to the export of products and services. It is known that it is created and used for the purpose of promoting the country as an investment destination, but also for the promotion of national culture. Very often we meet with created private brands whose semantic expression indicates the country of origin, creating a logical connection between the product and the image of the country. There have been cases of companies outside Italy using Italian names for customers associated to the prestigious Italian design, but in fact, they have nothing to do with Italy. There are also cases of association of Japan (modern electronic technology), of Germany (high quality), and so on. Before we move on further analysis we give some basic note of the brand, a national brand and national image. Domain of our consideration is a national branding in the context of the promotion of exports of goods and services. In the previous hypothetical examples we identified the national labeling with national branding, and this approach has been retained in the text below. Reason for identification is that national branding discussed in the context of promoting exports. The national designation is a voluntary activity, and it gives us a clear statement of origin. The labeling clearly indicates the national origin of goods, while simultaneously establishes the connection with national brand or brands.

NATIONAL IMAGE AND NATIONAL BRAND

Image of the country is a complex category with adequate building requires well planned, designed and coordinated activities. The problem of measurement of national image is solved by country ranking, so now we have several rankings which give different results in the rating of the country. We shall

Anholtov National Brand Index (NBI) i East-West Golbal Index 200. Ova dva indeksa su različito strukturirana i koriste različite ulazne informacije tako da daju i različite rezultate u rangiranju zemalja.

Martin i Eroglu (1993) pod imidžom zemlje smatraju skup svih opisnih i informacionih vjerovanja koje pojedinac ima o određenoj zemlji. Thakor i Katsanis (1997) imidž zemlje definišu kao skup znanja o asocijacijama različite kompleksnosti i snage o određenoj zemlji. Ove asocijacije podrazumijevaju i izgrađene stereotipe o zemlji koji su sveobuhvatni i doprinose širenju određenih vjerovanja i stavova o zemlji. Nacionalni imidž obuhvata: vrijednost zemlje i nematerijalnu imovinu vezanu za zemlju. Vrijednost zemlje predstavlja udio potrošačeve sklonosti ka brendu ili proizvodu koji je izveden iz grupe proizvoda vezanih za određenu zemlju. Nematerijalna imovina podrazumijeva asocijaciju na zemlju koja odražava sud o dimenzijama kvaliteta koje zemlja verifikuje putem izvoza. Naime, nematerijalna imovina nacionalnog imidža je ekvivalentna stavu potrošača o razlici u vrijednosti koju dobija opredjeljenjem za određeni nacionalni brend. Dva su osnovna efekta imidža zemlje: „Halo“ efekat i sumarni efekat. „Halo“ efekat je prisutan kada potrošač formira svoj stav o proizvodu prije njegove kupovine. Sumarni efekat predstavlja shvatanje zemlje na bazi akumuliranih iskustava sa proizvodima i brendovima iz određene zemlje. Ova dva efekta nacionalnog imidža su u interakciji i doprinose boljem prihvatanju proizvoda sa nacionalnim predznakom. Nacionalni imidž je dinamična kategorija koja je podložna stalnim namjernim i nenamjernim promjenama. U izgradnji nacionalnog imidža učestvuje čitav skup nacionalnih institucija, baveći se imidžom zemlje svaka iz svog aspekta.

Ishodište aktivnosti na promovisanju zemlje i izgradnji nacionalnog imidža je izgradnja nacionalnog brenda. U literaturi postoje različite definicije brenda tako da se brend (marka) definiše kao holistička suma svih podataka o proizvodima ili grupama

mention two rankings: Anholtov National Brand Index (NBI) and the East-West Golbal Index 200. These two indices are structured differently and use different inputs which give different results in ranking of countries.

Martin and Eroglu (1993), under the image of the country consider the set of all descriptive information and belief that an individual has about a particular country. Thakor and Katsanis (1997) define the country's image as a collection of knowledge on associations of varying complexity and strength of a country. These associations imply constructed stereotypes of the country that are comprehensive and contribute to the spread of certain beliefs and attitudes about the country. National image includes: value of country and intangible assets related to the country. The value of country's share of the consumer's preference for brand or product that is derived from a group of products related to a specific country. Intangible asset entail the association of a country that reflects the judgment of the level of quality that verifies the country through exports. The intangible asset of the national image is equivalent to the attitude of consumers in the difference between values received by the commitment to a national brand. There are two main effects of the country's image, "halo" effect and the summary effect. "Halo" effect is present when consumers form their opinion about the product before they buy it. The summary effect is the comprehension of country based on accumulated experiences with products and brands in a specific country. These two effects of national image interact and contribute to better acceptance of the product with a national prefix. National image is a dynamic category that is subject to constant intentional and unintentional changes. The building of national image involves a group of national institutions dealing with the image of the country, each with its aspects.

Goal of activities in promotion of the country and building a national image is building a national brand. In the literature there are different definitions of the brand so that the brand is defined as the sum of holistic information about the products or product groups

proizvoda radi poboljšanja vjerodostojnosti i rejtinga organizacije, ili brend predstavlja prepoznatljivu oznaku ili ime određenog proizvoda, stvarajući snažan i trajan identitet proizvoda ili usluge i predstavlja posebnost kompanije i podstiče osjećaje povjerenja, korisnosti i sigurnosti. Bitna karakteristika je što on diferencira proizvod, uslugu ili kompaniju od ostalih konkurenata na tržištu. Funkcija brenda je da svojim identitetom prenese određenu poruku potrošačima i da stvori određenu sliku u potrošačevom doživljavanju brenda. Ističemo dva važna aspekta brenda: (1) iskustveni, koji predstavlja skup svih dodirnih tačaka sa brendom; (2) psihološki, simbolička konstrukcija kreirana u mišljenju ljudi i sadrži sve informacije i očekivanja koja asociraju na proizvod ili uslugu.

Ne ulazeći u detaljniju klasifikaciju brendova, mi ćemo navesti dvije osnovne grupe brendova: krovni ili grupni brendovi i pojedinačni brendovi. Krovni brendovi se odnose na grupu proizvoda ili na čitavu kompaniju ili određenu privrednu granu ili pak na određeni geografski prostor. Nacionalni brend svrstavamo u ovu grupu. Pojedinačni brendovi se vezuju sa pojedinačnim proizvodima ili sa pojedinačnim kompanijama prisutnim u jednoj uskoj privrednoj grani. Imidž zemlje je u jakoj interakciji sa nacionalnim brendom tako da postoji njihova velika međuzavisnost, povezanost i međusobno djelovanje. Postoji velika razlika u izgradnji nacionalnog brenda i pojedinačnog brenda. Naime, specifičnost izgradnje nacionalnog brenda je sadržana u sljedećem:

1. Pri kreiranju pojedinačnih brendova, moguće je sprovesti bilo koju aktivnost koja podrazumijeva i povlačenje proizvoda sa tržišta, unaprijediti i modifikovati brend, ukinuti postojeći i uvesti novi brend. Sve ove aktivnosti nije moguće sprovesti pri kreiranju nacionalnog brenda.
2. Kod nacionalnih brendova postoji problem mjerenja efikasnosti. Zbog različitih interesa, pojedini aspekti brenda nemaju istu relativnu vrijednost za

in order to improve the credibility and rating organization, or a recognizable brand name or label of a product, creating a strong and lasting identity of the product or service and a special company and encourages feelings of trust, usefulness and safety. An important feature is that it differentiates the product, service or company from other competitors in the market. The function of a brand is to communicate its identity through a certain message to consumers and to create a specific image in the consumer's perception of the brand. We point out two important aspects of the brand: (1) Experiential aspect, which is the set of all points of contact with the brand. (2) Psychological aspect, which is symbolic structures created in the opinion of the people and contains all the information and expectations associated with a product or service.

Without going into a detailed classification of the brands we listed two main groups of brands: roof or group brands and individual brands. Group brand is related with a group of products or the entire company or a specific economic sector or a particular geographic area. National brand is classified in this group. Individual brands are associated with individual products or individual companies present in a particular sector. Image of the country is in a strong interaction with national brand, so there is their big interdependence, connectivity and interoperability. There is a big difference between building a national brand and individual brand, the specificity construction of the national brand is contained in the following:

1. When creating individual brands, it is possible to carry out any activity that involves withdrawal from the market, enhance and modify the brand, to abolish existing and introduce new brand. All of these activities cannot be performed when creating a national brand.
2. For national brands there is a problem of measuring efficiency. Due to different interests, aspects of the brand have not the same relative value for different

- različite institucije, tako da postoji problem u definisanju kriterijuma za ocjenu efikasnosti.
3. Nacionalno brendiranje podrazumijeva superviziju i koordinaciju jedne institucije tako da ona direktno diktira aktivnosti učesnika procesa.
 4. Marketari imaju manju mogućnost kontrolisanja nacionalnog brenda u odnosu na pojedinačni brend. Nacionalni brend ima problem nekontrolisanih informacija o brendu, što nije slučaj kod pojedinačnog brenda.
- institutions so that there is a problem in defining the criteria for assessing the effectiveness.
3. National branding asked supervision and coordination from the one institution so that it directly dictates the activities of institutions involved in the process.
 4. Marketers have less ability to control the national brand in relation to a particular brand. As the national brand is a problem of uncontrolled information on the brand, which is not the case of single brand.

Danas se kao lideri u sistematskom i planskom uspostavljanju i vođenju nacionalnog brenda ističu: Novi Zeland, Singapur i Japan. U primjeru Novog Zelanda nosilac aktivnosti na izgradnji nacionalnog brenda je Odbor za razvoj trgovine. Slogan novozelandskog nacionalnog brenda je The New Zealand Way NZW. Nacionalni brend kao krovni brend doprinosi smanjenju rizika pri uvođenju novih proizvoda na tržište i poboljšava stav o kvalitetu i karakteristikama novih proizvoda. Krovni brend prenosi svoje karakteristike na sve proizvode koji se nalaze pod njegovim okriljem, pojačava pojedinačne brendove manje vrijednosti, a, s druge strane, i pojedinačni brendovi imaju uticaj na poboljšanje nacionalnog brenda.

Doprinos teorijskim i praktičnim osnovama nacionalnog brendiranja dali su Simon Anholt, Wally Olins, Philip Kotler i drugi.

PROMJENA U OKRUŽENJU ZA NACIONALNO BRENDIRANJE

U posljednje dvije decenije proces ekonomske globalizacije je poprimio neslućene razmjere, a rezultat je velika povezanost i međuzavisnost nacionalnih ekonomija. Opšte smanjenje barijera za kretanje roba i kapitala dovelo je do veoma pogodnog okruženja za ekspanziju multi-nacionalnih kompanija. Veliki rast svjetske trgovine nije rezultat samo rasta

Today, as leaders in a systematic and planned establishment and management of national brand stand out: New Zealand, Singapore and Japan. In the case of New Zealand, the Board of Trade Development is responsible for activities to build national brand. The slogan of the New Zealand national brand is: "The New Zealand Way", NZW. National brand as an umbrella brand helps to reduce the risk of introducing new products to market and improve the position of the qualities and characteristics of new products. Umbrella brand conveys its own characteristics on all products that are found on its auspices, enhances individual brands inferiority; on the other hand, individual brands have an impact on the improvement of the national brand.

Contribution to the theoretical and practical basis of national branding gave Simon Anholt, Wally Olins, Philip Kotler and others.

CHANGES IN ENVIRONMENT FOR NATIONAL BRANDING

In the last two decades, economic globalization has assumed great dimension, the result is a connection and interdependence of national economies. General reduction of barriers to the movement of goods and capital, has led to a very favorable environment for the expansion of multinational companies. A large increase in world trade is not only the

finalne potrošnje, već je to u značajnoj mjeri rezultat rasta trgovine intermedijarnim proizvodima, a što je posljedica kretanja kapitala koje je iniciralo rast intrakompanijske razmjene. U nastojanju kompanija da minimiziraju troškove poslovanja i maksimiziraju profit, investicije su se kretale ka destinacijama koje obezbjeđuju niže troškove poslovanja (radna snaga, transport, porezi,...). Takođe, kompanije neprestano tragaju za jeftinijim izvorima intermedijarnih proizvoda i usluga. Sve ovo za rezultat ima smanjenje nivoa nacionalnog sadržaja u finalnim proizvodima i uslugama. Imajući u vidu prethodnu činjenicu, suočavamo se sa pitanjem koliko ostvareni izvoz realno doprinosi rastu BDP? Rast nacionalnog izvoza ne znači i rast neto izvoza (ukupan izvoz - uvozne komponente i usluge sadržane u izvezenim proizvodima i uslugama). Ako nacionalno brendiranje prihvatimo kao instrument za podršku izvozu, uz značajnu finansijsku podršku države, onda se otvara pitanje: Čiji izvoz podržavamo novcem poreskih obveznika?

Najnovija istraživanja ukazuju na problem međunarodne vertikalne integracije proizvodnje, što za rezultat ima smanjenje domaćeg sadržaja u izvoznim proizvodima. Takav proizvod (usluga) gubi na svom nacionalnom identitetu. Prema istraživanju R.Cappariello (2012), u izvozu italijanske prerađivačke industrije strani sadržaj je u periodu 2000-2007. porastao sa 32,5% na 38,3%. Za Francusku i Njemačku podaci su slični, tako da za Francusku imamo da je strani sadržaj porastao sa 33,6% na 36%, a kod Njemačke je sa 29,9% na 34,5%. U italijanskoj prerađivačkoj industriji, domaći sadržaj je najniži kod rafiniranih proizvoda nafte i nuklearnog goriva 22,4%, kancelarijskih mašina i računara 39,8%, hemikalija i hemijskih proizvoda 47%, najveći kod duvanskih proizvoda 93,8%, štampanih izdanja i drugih medija 76,3%, hrane i pića 74,8%, proizvoda od drveta 69,8% itd. Slično istraživanje je rađeno i za Kinu. Na bazi input-output analize R. Koopman, Z. Wang i S. Wei (2008.) su došli do sljedećih rezultata: domaći sadržaj u izvoznim proizvodima kineske prerađivačke industrije je u periodu 1997-2007 pao sa 82,4% na 71,3%.

result of final consumption, but this is largely a result of the growth of trade intermediate products, and as a result of capital movements which initiated the growth intra company trade. The company's efforts to minimize costs and maximize profits, and investments were moving towards destinations that provide lower operating costs (labor, transportation, taxes, etc.). Also, the company is constantly looking for cheaper sources of intermediate goods and services. All these trends resulted in reduction of level of national content in export products and services. Bearing in mind the fact we are faced with the question of how export performance contributes to the growth of real GDP? National export growth does not mean the growth of net exports (total exports - imports components and services embodied in exported goods and services). If you accept national branding as a tool to support exports, with substantial financial support from the government, then the question arises: Whose export is supported by taxpayers' money?

Recent research suggests the problem of international vertical integration of production results in reduction of domestic content in exports. Such product (service) loosed its national identity. According to research of R.Cappariello (2012), the export of Italian manufacturing sector foreign content in the period of 2000-2007, increased from 32.5% to 38.3%. In France and Germany data are similar, so in France we have increase of foreign content from 33.6% to 36%, while in Germany it rose from 29.9% to 34.5%. In Italian manufacturing industry, local content is the lowest in refined petroleum products and nuclear fuels 22.4%, office machinery and computers 39.8%, chemicals and chemical products 47%, the highest in tobacco products 93.8%, and other printed publications media 76.3%, food and beverages 74.8%, wood products 69.8%, etc.. Similar research has been done for China. On the basis of the input-output analysis of R.Koopman, Z.Wang and S.Wei (2008), found following: Domestic content in exports of Chinese manufacturing industry in the period of 1997-2007 fell from 82.4% to 71.3%. In 2007, the minimum local content value was recorded

U 2007. godini najniži sadržaj domaće vrijednosti imale su elektornске komponente 32,3%, audiovizeulni aparati 32,6%, računari 33,9%, a najveći cementi, obloge i malteri 88,4%, vatro-stalni materijali 84,7%, tkanine 83,9%.

Šta se dešava u svijetu? Kakva je pozicija zemalja u razvoju? Prema podacima UNCTAD, u 2010. godini, svjetski prosjek za strani sadržaj u izvoznim proizvodima je 28%. Za razvijene zemlje prosjek stranog sadržaja je 31%, s tim što je za EU strani sadržaj 39%, a za SAD 11%. Kod zemalja u razvoju strani sadržaj je 25%, i to kod azijskih zemalja 27%, kod zemalja Latinske Amerike 21%, a kod tranzicionih zemalja 13%. OECD i WTO su formirali bazu podataka TiVA (Trade in Value Added) koja prati kretanje svjetske trgovine sa aspekta izvora dodatne vrijednosti sadržane u proizvodima. Trenutno baza podataka pokriva zemlje članice OECD, Rusiju, Brazil, Kinu, Indiju, Indoneziju i Južnu Afriku. Za 2009. godinu imamo podatke da je u izvozu Mađarske strani sadržaj iznosio 40,75%, Turske 21,07%, Slovenije 30,56%, Danske 30,5%, a u zemaljama koje nisu obuhvaćene TiVA 32,05%. Trend povećanja stranog sadržaja u izvozu je evidentan, tako da je potrebno pažljivije kreirati program državne podrške u kreiranju nacionalnih brendova.

Sljedeći problem proističe iz hipotetičkog primjera 1. Proizvod dominantno sadrži domaće intermedijarne proizvode, ali je proizveden upotrebom stranih faktora proizvodnje (strani kapital). Čuvena automobilska marka „Mini“ je u vlasništvu njemačke korporacije BMW. Bez obzira na to što je postojala jaka asocijacija brenda „Mini“ sa britanskom tehnologijom, dizajnom i kvalitetom, to je danas njemački brend. Po preuzimanju brenda „Mini“ od strane BMW, u te automobile je ugrađena BMW tehnologija, tako da ne možemo govoriti o britanskom brendu. Kod automobila „Mini“ imamo i značajno korištenje njemačkog znanja koje je opredmećeno u naprednoj tehnologiji ugrađenoj u automobil. Državna podrška u kreiranju brendova pod kontrolom stranog kapitala je problematična, pošto takva situacija omogućuje da se upotrebom novca

as 32.3% approaches electronic components, audio and video equipment 32.6%, 33.9% for computers, and most cements, coatings and plasters 88.4%, 84.7% refractory materials, fabrics 83.9%.

What is going on in the world? What is the position of the developing countries? According to the UNCTAD, during 2010, the world average for the foreign content of exports is 28%. For developed countries the average of foreign content is 31%, in the EU foreign content is 39% and 11% is for the USA. In developing countries foreign content is 25%, in Asian countries 27%, the countries of Latin America 21%, in transition countries 13%. OECD and WTO have formed a database TiVA (Trade in Value Added), which follow the movement of world trade in terms of sources of value added contained in products. Currently the database covers OECD countries, Russia, Brazil, China, India, Indonesia, and South Africa. For 2009 we have data that foreign content in export from Hungary was 40.75%, 21.07% in Turkey, 30.56% in Slovenia, in Denmark 30.5%, and in countries that are not included in TiVA 32.05%. The trend of increasing foreign content in exports is evident, so there is need to carefully develop a program of state support in creation of national brands.

The next problem is derived from hypothetical examples 1. The product contains predominantly domestic intermediate goods, but is manufactured using foreign factors of production (foreign capital). The famous car brand „Mini“ is owned by German corporation BMW. Regardless of the fact that there was a strong association of the brand „Mini“ with British technology, design and quality, it is German brand. After taking over the brand „Mini“ by BMW, the car is built by BMW technology, so we cannot talk about British brand. We have significant use of German knowledge in „Mini“ cars that is materialized in the advanced technology built into the car. State support in brand creation un-

poreskih obveznika na indirektan način povećava prinos na strani kapital. Mehanizmom transfernih cijena lako se obezbjeđuje lociranje profita u skladu sa interesima vlasnika kapitala. Podrška ovakvim brendovima (njihovo stavljanje u nacionalni kontekst) ne mora da ima pozitivan efekat na BDP, a pogotovo ne na BNP. Proces globalizacije je omogućio olakšan protok kapitala, a što za rezultat ima viši nivo stranog kapitala u domaćoj ekonomiji i izvozu.

Kvalitetnije domaće kompanije teže ka internacionalizaciji poslovanja, a, posebno, one čija su domicilna tržišta mala i ne obezbjeđuju dovoljno prostora za rast. Prethodno smo naveli da je globalizacija olakšala kretanje kapitala, tako da domaće kompanije u izboru strategija internacionalizacije mogu da se opredijele za varijantu uspostavljanja proizvodnje u inostranstvu. Proizvodnjom u inostranstvu pozitivno se utiče na BNP, ali i na BDP, jer će se, vjerovatno, koristiti domaći intermedijarni proizvodi, koji se inače koriste u domicilnoj zemlji. Proizvodi proizvedeni u inostranstvu na ovaj način nemaju više odrednicu „Made in USA, Russia, Germany“, ali imaju odrednicu „Made by USA, Russian, German capital or knowelge“.

U cilju prevladavanja problema nivoa nacionalnog sadržaja u izvoznim proizvodima, pokrenuta je inicijativa za nadnacionalno označavanje "Made in World", koja treba da pospješi međunarodnu trgovinu. Ovakvom inicijativom se prevazilazi značaj nacionalnog označavanja i nacionalnog brendiranja i onemogućuje se diferenciranje proizvoda na osnovu nacionalnog brendiranja.

KOJA JE RAZLIKA IZMEĐU "MADE IN" I "MADE BY"?

"Made in" označava proizvode koji imaju nacionalni identitet, tj. proizvedeni su prevlađujućom upotrebom nacionalnih inputa u naznačenoj zemlji (Shema 1). Nacionalna oznaka je u tijesnoj vezi sa nacionalnim brendom ili brendovima, nacionalna oznaka uspostavlja jasnu i nedvosmislenu vezu sa nacionalnim brendom.

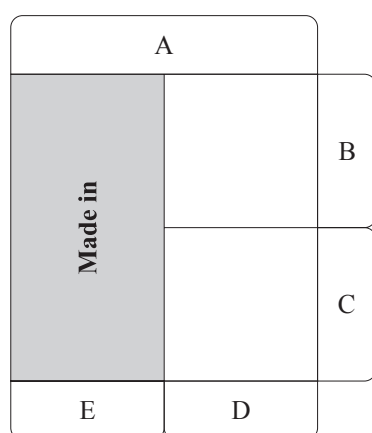
der the control of foreign capital is problematic, as the situation allows the use of taxpayer money to indirectly increase the return on foreign capital. Transfer pricing mechanism ensures easy locating profits in accordance with the interests of shareholders. Support for these brands (putting them in the national context) does not have a positive effect on GDP, and certainly not to the BNP.

Domestic companies with higher quality of business operations tend towards internationalization, especially those that operate on the small domestic markets that do not provide enough space for growth. Previously, we have stated that globalization facilitates movement of capital, because of that local companies in the selection of strategy of internationalization can pursue variant of establishing production abroad. Production abroad by national capital had a positive impact on GNP, and on GDP in case that the company abroad use domestic intermediate products that usually use in the home country. The products manufactured abroad in this way no longer categorized as "Made in the USA, Russia, Germany," but have the designation of "Made by USA, Russian, German or knowledge capital."

For prevalence of the problem of the level of national content in export products there established initiative for a supranational mark "Made in World". Such initiatives are beyond the importance of national identification and national branding, and make impossible to differentiate products on the basis of national branding.

WHAT IS DIFERENCE BETWEEN "MADE IN" AND "MADE BY"?

"Made in" means products that have national identity, it means that they produced by mainly usage of domestic inputs in specified country (Scheme 1). National label is closely related to the national brand, national labeling establishes clear and unambiguous link with national brand.

**Legenda:****Legend:**

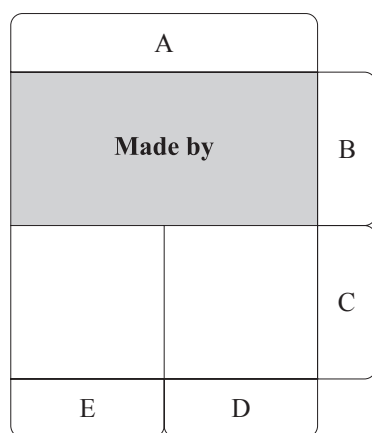
- A Nacionalna teritorija
National territory
- B Proizvodnja sa upotrebom nacionalnih inputa
Production with national inputs
- C Proizvodnja sa upotrebom stranog kapitala
Production with foreign capital
- D Proizvodnja sa preovlađujućom upotrebom stranih inputa
Production with mainly foreign inputs
- E Proizvodnja sa preovlađujućom upotrebom nacionalnih inputa
Production with mainly national inputs

Shema 1. "Made in"

Scheme 1. "Made in"

S druge strane, "Made by" ćemo definisati kao označavanje koje implicira na proizvode koji su proizvedeni upotrebom nacionalnog kapitala i znanja, a, djelimično, i nacionalnih inputa (Shema 2). Takav proizvod nije nužno proizveden u zemlji, ali možemo reći da je proizveden pod kontrolom nacionalnih faktora.

On the other hand, "Made by" will be defined as labeling implies that products are manufactured using national capital and knowledge, and partly national inputs (Scheme 2). Such product is not necessarily produced in the country, but we can say that it is produced under the control of national production factors.

**Legenda:****Legend:**

- A Nacionalna teritorija i inostranstvo
National territory and abroad
- B Proizvodnja sa upotrebom nacionalnih inputa
Production with national inputs
- C Proizvodnja sa upotrebom stranog kapitala
Production with foreign capital
- D Proizvodnja sa preovlađujućom upotrebom stranih inputa
Production with mainly foreign inputs
- E Proizvodnja sa preovlađujućom upotrebom nacionalnih inputa
Production with mainly national inputs

Shema 2. "Made by"

Scheme 2. "Made by"

Suštinska razlika između ova dva koncepta je u tome što se kod prvog težište stavlja na proizvodnju u zemlji, upotrebom nacionalnih inputa, dok se kod drugog težište stavlja na upotrebu nacionalnih faktora, bez obzira na lokaciju proizvodnje. Drugi koncept uvažava globalno okruženje i korištenje prednosti koje takvo okruženje donosi. Istovremeno, promovise se efikasna upotreba nacio-

The essential difference between two concepts is that the first focuses on the production inside of the country, the use of national inputs, while the second focuses on the use of national factors, regardless of the location of production. The second concept takes into account the global environment and taking advantage that such an environment brings. At the same time, concept "Made by" promotes

nalnih faktora i korištenje efekata ekonomije obima, kao i potreba za kompleksnijim oblicima internacionalizacije poslovanja kompanija. Koncept "Made by" je kompatibilan sa industrijama zasnovanim na znanju, mada se može primijeniti i na druge industrije. "Made by" obezbjeđuje veću mogućnost za interakciju i sinergetske efekte između privatnih i nacionalnih brendova. Dok "Made in" na indirektni način promovise reindustrijalizaciju nacionalne ekonomije, "Made by" to nema u svom primarnom cilju. "Made in" je koncept koji je u skladu sa obračunom BDP-a, a "Made by" je u skladu sa obračunom BNP-a. I jedan i drugi omogućavaju diferencijaciju na osnovu nacionalnog identifikovanja, ali sa drugačijim pristupom u identifikaciji nacionalne pripadnosti.

ŠTA JE RJEŠENJE ZA KREIRANJE I PODRŠKU NACIONALNIM BRENDOVIMA?

Na osnovu prethodno izloženih činjenica, jasno je da se nacionalnom brendiranju treba pristupiti sa velikom pažnjom uz prethodno jasno definisan stav države o nacionalnom brendiranju. Spoljnotrgovinskom politikom, u segmentu podsticaja izvoza, država treba da definiše stav prema konceptima "Made in" i "Made by". Problem je komplikovaniji u malim ekonomijama koje imaju visok stepen otvorenosti ili teže ka višem nivou međunarodnog ekonomskog povezivanja. Takođe, nerazvijene ekonomije i ekonomije u razvoju imaju problem nižeg nivoa razvoja pratećih sektora koji proizvode intermedijarne proizvode. Rezultat je nedostupnost određenih intermedijarnih proizvoda dobijenih u zemlji, ili njihova visoka cijena, ili niži nivo kvaliteta, ili njihova tehnička neusaglašenost.

Imajući u vidu trendove u međunarodnoj vertikalnoj integraciji proizvodnje, očekuje se da će doći do daljeg smanjenja nacionalnog sadržaja u izvoznim proizvodima. Takođe, postoji razlika u nivou nacionalnog sadržaja u različitim sektorima. Sektori kao što su pre-

the efficient use of national factors and the use of the effects of economies of scale and need for more complex forms of internationalization of companies. The concept "Made by" is compatible with knowledge-based industries, although it can be applied to other industries. "Made by" provide greater opportunity for interaction and synergy effects between private and national brands. While "Made in" indirectly promotes the reindustrialization of the national economy, "Made by" is not in its primary goal. "Made in" is a concept that is consistent with the calculation of GDP, and "Made by" is consistent with the calculation of GDP. Both allow differentiation on the basis of national identification, but with a different approach to the identification of national frame.

WHAT IS SOLUTION FOR CREATING AND SUPPORTING NATIONAL BRANDS?

Based on the facts set forth above, it is clear that national branding should be approached with great care with previously clearly defined position of the state in national branding. By foreign trade policy in the area of export incentives, the state should define attitude towards the concepts of "Made in" and "Made by". The problem is complicated for small economies that have high level of openness or aspire to higher level of international economic links. Also, underdeveloped economies and developing economies have the problem with low levels of development related sectors producing intermediate goods. The result is the unavailability of certain intermediate products obtained in the country, or their high price, or a lower level of quality or a technical noncompliance.

Given trends in international vertical integration of production expect that there will be further reduction of national content in the export product. Also, there is a difference in the level of national content in different sectors. Sectors such as the food industry

hrambena industrija i industrije zasnovane na preradi sirovina lokalno raspoloživih, imaju veoma visok nivo domaćeg sadržaja, dok sektori sa naprednijim tehnologijama i višim nivoima prerade, imaju značajno niži udio domaćeg sadržaja. Globalno okruženje nameće potrebu za preispitivanjem državne spoljnotrgovinske politike u obalsti podsticaja izvoza (nacionalno brendiranje). Isključivo opredjeljenje za koncept "Made in" otvara problem prihvatljivog minimalnog nivoa domaćeg sadržaja. Kod ostalih programa podsticaja izvoza (podrška u finansiranju izvoznih poslova) uobičajeno je da minimalni nivo domaćeg sadržaja iznosi 51% i da se pruža podrška shodno utvrđenom nivou domaćeg sadržaja. Nacionalno brendiranje nije moguće dijeliti proporcionalno domaćem sadržaju, tako da je neophodno donijeti odluku koji je nivo domaćeg sadržaja prihvatljiv za nacionalno brendiranje. Koncept "Made in" otvara pitanje nacionalnog brendiranja proizvoda proizvedenih u kompanijama koje su u većinskom stranom vlasništvu. Koliko je opravdano novcem poreskih obveznika podržavati strani Kapital? S druge strane, koncept "Made by" kako smo ga prethodno definisali, otvara pitanje zašto podržavati kompanije koje su izvezle Kapital u druge zemlje i na taj način doprinose razvoju drugih ekonomija. Ne treba ispustiti iz vida značaj nacionalnog brendiranja na domaćem tržištu, posebno u velikim ekonomijama sa znatnim potrošačkim potencijalom domaćeg tržišta.

Kanda je preduzela određene aktivnosti u nacionalnom označavanju kako bi odgovorila na promijenjene uslove globalne ekonomije. Kanadski biro za konkurentnost je 2009. godine izdao vodič za označavanje proizvoda sa „Made in Canada“ i „Product of Canada“, koji je zamijenio uputstvo koje je bilo na snazi od početka 2002. godine. Do 2009. godine u Kanadi je egzistirala samo oznaka „Made in Canada“, a novom regulativom je definisana oznaka „Product of Canada“. U skladu sa novom regulativom, sa „Made in Canada“ mogu se označavati samo oni proizvodi koji imaju najmanje 51% kanadskog sadržaja (rad + materijali), a proizvedeni su u Kanadi. Sa oznakom „Product

and processing industries based on locally available raw materials, have very high level of domestic content, while those with more advanced technologies and higher levels of processing, have significantly lower share of domestic content. Global environment imposes the need for revision of the state of foreign trade policy in export incentives (national branding). Only commitment to the concept of "Made in" raises the issue of an acceptable minimum level of domestic content. In other programs, export incentives (support in export financing) common minimum level of domestic content is 51%, and provides support in accordance with the established level of domestic content. National branding can not be shared in proportion to the domestic content, so it is necessary to decide which level of domestic content acceptable for national branding. The concept of "Made in" raises the question of national branding of products manufactured by companies that are majority foreignowned. How valid is the taxpayers' money spent to support foreign capital? On the other hand, the concept of "made by" as we have defined it, raises the question of why should we support companies that exported capital to other countries, thus contributing to the development of other economies. We should not loose sight of the importance of national branding on the domestic market, especially in large economies with potential of domestic market.

Canada has taken specific actions in the national labeling, in order to respond to the changed conditions of global economy. The Canadian Competition Bureau's 2009 issued a guide for marking products with "Made in Canada" and "Product of Canada", which replaced the manual that has been in effect since early 2002. Until 2009, in Canada there was only the label "Made in Canada", new regulation defined new label "Product of Canada". In accordance with the new legislation, the "Made in Canada" can mean only those products that have at least 51% Canadian content (materials + labor) and are manufactured in Canada. La-

of Canada“ se označavaju proizvodi koji imaju najmanje 98% kanadskog sadržaja, a proizvedeni su u Kanadi. I kod jednog i kod drugog označavanja obavezan uslov je da su materijali i komponente uvoznog porijekla promijenile svoj oblik, i mogu se smatrati potpuno drugim proizvodom. Kanada se opredijelila za koncept koji promovira proizvodnju u Kanadi, a koja primarno koristi kanadske inpute. Zakonska regulativa Kanade strogo zabranjuje upotrebu bilo koje oznake (slika, kombinacija slova ili riječi, kombinacija znakova, slika i slova) koja upućuje na kanadsko porijeklo, a da nisu ispunjeni uslovi za nacionalno označavanje. Iz ovakvog regulisanja nacionalnog označavanja u Kanadi, jasno je da država nastoji da zaštiti izgrađeni nacionalni brend.

Uz slične principe, ali sa komplikovanim pravilima, SAD su regulisale nacionalno označavanje. U SAD nacionalno označavanje ima veliku važnost na domaćem tržištu, zbog jake konkurencije roba iz drugih zemalja. Američka automobilska industrija, nekada nacionalni ponos, doživjela je potpuni kolaps u nadmetanju sa japanskom, korejskom i evropskom konkurencijom. Nacionalno označavanje u SAD ima sasvim drugačiju dimenziju u odnosu na ostale zemlje.

ZAKLJUČAK

Ovdje dajemo moguće rješenje za koji koncept treba da se opredijeli država kod nacionalnog brendiranja. Opredjeljenje države treba da bude kombinacija podrške privatnim i nacionalnim brendovima i brendiranju, uz izbalansirano prihvatanje i koncepta „Made in“ i „Made by“. Sektorska analiza, kao i nacionalne razvojne strategije, treba da daju odgovor o dostignutom nivou razvoja sektora kao i ciljanom nivou razvoja pojedinačnih sektora. Prema tome, treba da bude koncipirana strategija razvoja privatnih i nacionalnih brendova. Sektori kod kojih postoji resursna osnova i mogućnost vertikalne proizvodne integracije i diversifikacije, su obavezno predmet podrške u nacionalnom brendiranju. Ovakvi sektori

beled “Product of Canada” denotes products that have at least 98% Canadian content, and are manufactured in Canada. In both cases the mandatory labeling requirement is that the materials and components imported origin changed its shape, and can be considered as completely different product. Canada is committed to the concept that promotes the production in Canada, which primarily benefit the Canadian inputs. Legislation of Canada strictly prohibits the use of any label (picture, letter combinations or words, combination of signs, pictures and letters) that refers to the Canadian origin, and that the conditions for national labeling did not full filled. There is clear that Canada try to protect built national brand.

With similar principles, but with more complicated rules, the USA regulated national labeling. In the USA national labeling has great importance on the domestic market due to strong competition from goods of other countries. The USA auto industry, once a national pride, has experienced a complete collapse in competition with the Japanese, Korean and European competition. National designation in the USA has completely different dimension compared to other countries.

CONCLUSION

In conclusion we give a possible solution to the concept that should be dedicated to the state in national branding. Policy of the state should be a combination of support to private and national brands and branding, with a balanced acceptance concepts “Made in” and “Made by”. Sector analysis, as well as the national development strategy should give an answer to the progress in the development of the sector as well as the targeted level of development of individual sectors. Therefore, there should be designed strategy of development of private and national brands. The sectors which have a resource base and the possibility of vertical integration and diversification are subject to mandatory support through national branding. These sectors with high level of domestic

zbog visokog nivoa domaćeg sadržaja, uz podršku kroz nacionalno brendiranje, treba da budu podržani i kroz podršku razvoju privatnih brendova ali samo onih koji su pod kontrolom domaćeg (nacionalnog) kapitala. Razvojem privatnih brendova ostvaruje se pozitivan efekat i na nacionalni brend. U sektoru sa višim tehnologijama manji je nivo domaćeg sadržaja u proizvodima. Ako bismo se pridržavali koncepta „Made in“, ovi sektori ne bi bili podesni za podršku u brendiranju i nacionalnom brendiranju, čime bi bili eliminisani sektori koji omogućuju značajniji razvoj nacionalne ekonomije. Rješenje koje uvažava interese nacionalne ekonomije daje-mo u obliku matrice (Shema 3). Potamnjenim poljima su označene varijante podesne za državnu podršku u brendiranju.

content, in addition to support through national branding should be supported, supporting the development of private brands, but only those that are under the control of domestic (national) capital. The development of private brands achieved a positive effect on the national brand. In sectors with higher technologies we have fact that is lower level of domestic content in products. If we adhere to the concept of "Made in" these sectors would not be suitable to support branding and national branding, which would be eliminated in sectors that provide significant development of the national economy. The solution takes into account the interests of the national economy are given in the form of a matrix (Scheme 3). Grayed fields are marked variations suitable for public support in branding.

| | Nacionalna teritorija National territory | | Inostranstvo Abroad | | |
|-------------------------------------|---|---------------------------------|----------------------------------|---------------------------------|--|
| privatni brend private brands | | | | | nacionalni kapital national capital |
| | | | | | strani kapital foreign capital |
| nacionalni brend national brands | | | | | nacionalni kapital national capital |
| | | | | | strani kapital foreign capital |
| | domaci inputi domestic inputs | strani inputi foreign inputs | domaci inputi domestic inputs | strani inputi foreign inputs | Proizvodnja sa Production with |

Shema 3. Solucije za podršku izvoza brenda

Scheme 3. Solution for support of export branding

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