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Corporate Social Responsibility as a Branding Element
—
A Case Study of Norwegian Cod Export to the Danish Market

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Executive Summary

This thesis' mission is to investigate the potential CSR has as a branding element in the branding strategy of Norwegian cod in Denmark. The research question has its background in the increasing competition from cheaper white fish substitutes Norwegian cod experience, and is thus believed to constitute a possible counterattack to this market challenge. Based on a theoretical foundation consisting of Corporate Social Responsibility (CSR) and branding, and a methodology focusing on expert interviews with various representatives within the Norwegian cod value chain and secondary sources of information, the research is carried out. It is concluded that CSR does not have a good enough potential to be part of the branding strategy of Norwegian cod in Denmark. The vast gap between the attitudes and behavior of consumers, is the main argument for the conclusion. Consumers' attitudes show that their buying behavior is positively influenced by CSR initiatives. On the contrary, their actual behavior showed that CSR initiatives had more or less a non-existing influence on them. Since coping with the market challenge demands behavior in terms of consumers buying more Norwegian cod, it is concluded that the potential of CSR as a branding element is not sufficient. However, this conclusion is based only on the present market situation. The future (5-10 years), depicts a much brighter potential for CSR as a branding element in the branding strategy of Norwegian cod. As the thesis also aims to contribute to the Norwegian Seafood Export Council's (NSEC) branding strategy, it suggests that, at the present time, they should not engage much in branding focusing on CSR. But as there is depicted a positive future, they should carefully monitor the market to prepare for the future of CSR as a branding element.

1 Introduction

The following chapter will present the case which forms the foundation and point of departure of this thesis. It will start with a presentation of the Norwegian Seafood Export Council (NSEC) and Norwegian cod and the branding strategy of it, which is the party the research represent. After that the market challenge Norwegian cod and NSEC is facing, and the authors reflections on the challenge will be presented. The reflections will end up in the definition of the research question and corresponding sub-questions. Following that, some thoughts on the methodological and theoretical aspects needed to answer the research question will be provided. Finally, necessary delimitations, and the rough structure of the rest of the thesis will be given.

1.1 Norwegian Seafood Export Council (NSEC)

Norway is the world's second largest exporter of fish in terms of value, and yearly there are served close to 10 billion meals containing Norwegian seafood worldwide (www.seafood.no #1) , www.seafoodfromnorway.com #1 and #2). The Norwegian Seafood Export Council (NSEC) plays an important role in the job of selling Norwegian seafood. It is a joint marketing organization, representing and supporting more than 450 Norwegian exporters. The market communication aims at distributing information about the high quality fish products from Norway have (www.seafood.no #2). Representing these exporters in more than 150 countries, makes NSEC the largest joint marketer of seafood in the world, and they are responsible for hundreds of market activities in more than 20 separate markets (www.seafoodfromnorway.com #1). Financially, the council is funded by the industry itself, through taxes on exported products. It origins from 1991, and is fully owned by the Norwegian state through the Ministry of Fisheries and Coastal Affairs (IBID).

NSEC does a number of activities such as marketing and PR, gathering of market information, market access information and contingency. In addition, they provide the industry with information about import quotas, customs duties and commercial conditions. This also includes global analyses of resources and competition situation (www.seafoodfromnorway.com #1).

1.2 The Generic Brand Strategy of Norwegian cod.

NSEC has, in cooperation with the cod industry, developed marketing and brand strategies on how to front cod in the global market. The brand strategy for Norwegian cod has a 3 year horizon. This is so because the conditions on both the demand- and supply side in the fish industry change rapidly, and therefore it is necessary with frequent evaluations and adjustments. The strategy is to be based on access to the resources, industry structure and expected market development, and shall communicate the vision that “*the best seafood comes from Norway*”. It is a goal that this vision shall be known worldwide. In order for this goal to be reached, some general guidelines for marketing activities have been developed. Firstly, all communication shall be based on the platform “Norwegian Fresh Cod – The Taste of Norway”. Secondly, cod shall be marketed the same way, regardless if it is wild caught, fed or farmed. This ensures that all types of cod live up to its image of being fresh and of exceptional quality. Throughout the world Norwegian cod is considered to be a fish of high quality. For example, in most seafood restaurants it is considered to be a gourmet fish, and is, according to Karin Olsen, NSEC’s marketing manager of the white fish segment (www.seafood.no #3), often labeled the Rolls-Royce of the white fish (stated in a conversation with the authors in march 2009).

That the different types of cod are not discriminated also helps to leverage the demand for cod throughout the whole year. There shall also not be any discrimination between frozen and fresh products. The intent is that the quality of the fresh products shall give positive synergies on the frozen products as well (www.seafood.no #4).

The most central and important part of the brand strategy, is the brand story of Norwegian cod. The story focuses on three features of Norwegian fishery. Firstly, it tells about the proud traditions the fishing industry in Norway has. The second feature is related to the good and healthy living conditions the Norwegian nature provides. More specifically, it tells about the clear and clean fjords where the fish is caught (www.seafood.no #4). The third feature of the story concerns the permanent values of Norwegian seafood; it is grown and harvested in a sustainable manner. This story is to be told on every occasion cod is promoted. The result of this effort has been that Norwegian Seafood is preferred by consumers worldwide (www.seafood.no #5).

In marketing campaigns the “NORGE” label is also important because it is a visual mean used to catch the attention of consumers. However, labels are not only limited to the “NORGE” label. It is opened up for the possibility of alternatives as well. Presently, several Norwegian fish types have started using the Marine Stewardship Council label (MSC), which recognizes that the specific type of fish is caught or farmed in a sustainable and environmentally friendly way (www.msc.org). However, Norwegian cod has still not achieved this recognition.

The “NORGE” logo; used in all branding and marketing campaigns of Norwegian cod:



Finally, the marketing and branding activities’ primary and most important target, is the end-consumers (www.seafood.no #4). However, that does not exclude marketing efforts in other parts of the value chain. Loyalty among purchasers, and other decision makers, in stores and in hotels, restaurants and catering businesses are also crucial in order to win the end-consumers (IBID).

An example of NSEC's work to brand Norwegian cod (www.seafood.no #4):



1.3 Market challenge.

As a player in a dynamic and global market, NSEC is constantly facing challenges affecting their operations. Presently, one of the biggest challenges is the competition from cheaper white fish. It is a problem NSEC experience both on a global and local level. Denmark is one of the markets where the challenge is present, and will form the market of investigation in this thesis. According to market analyst Ove Johansen in NSEC, the total 2008 export of cod was reduced by 10.000 tons because of the increased competition from cheaper substitutes such as Alaska Pollock and Pangasius (www.nrk.no #1). The challenge the cheaper substitutes constitute, is furthermore strengthened by the fact that Danish consumers list price as the number one barrier for consuming fish. In 2006, 51% of the respondents in a survey believed that fish in general was expensive. In 2007, the number had grown to 53%

(www.foodmarketing.dk). Moreover, if the favored type of fish becomes too expensive, 43% of the Danes are likely to buy a cheaper kind (Appendix 14).

In this paper we have chosen to focus particularly on pangasius and Alaska pollock as substitutes for Norwegian cod. Firstly, this limitation is made because these two fish types are very often mentioned when the threat from the cheaper substitutes is discussed. E.g., in a news article from February 2009 entitled “*the cod’s worst enemies*”, pangasius and Alaska pollock are given special attention (www.nrk.no #2). Moreover, it is stated that the whole of Europe is being flooded by these cheaper substitutes. That Alaska pollock and pangasius are of big concern is furthermore indicated by Jan Trollvik, director at NSEC. In a chart defining the white fish market by price and volume, pangasius and Alaska pollock are characterized by very low prices and very high volumes (www.seafood.no #6).

More specifically concerning pangasius, the production of it has increased from 100 000 tons to 1 000 000 tons from 2001 to 2007. In the same period the exported volume of pangasius increased from about 25 000 tons to about 450 000 tons (www.seafood.no #7). EU has in this period become one of the most important markets for pangasius. It has experienced an increase in imports from about 4000 tons in 2001 to almost 160 000 tons in 2007 (www.seafood.no #8).

The challenge of both pangasius and Alaska pollock is furthermore highlighted by observations done in Danish grocery stores. They revealed that the price of Norwegian cod is twice the price of both Alaska pollock and pangasius (Appendix 13). The rate of distribution showed that pangasius was present in seven out of seven stores, Alaska pollock was present in four out of seven stores and cod originating from Norwegian waters was present in three out of seven stores (www.seafood.no #8). All together it is quite evident that pangasius and Alaska pollock constitute a challenge for Norwegian cod, both in terms of price, distribution and consumer behavior.

The choice of limiting the number of competitors to include only pangasius and Alaska pollock, is also done of practical reasons. It makes it possible to conduct a more thorough comparison and analysis than what would be the case if all types of white fish were included.

1.4 The authors’ reflections on the market challenge

The market challenge described in the previous section, has been the inspiration of creating and investigating this thesis' research question. It lead the authors to start thinking of how one could respond to such a challenge. First of all we discussed the possibility of engaging in a price war. This was more or less immediately rejected as a wise strategy to pursue due to relatively high production costs associated with Norwegian cod, and relatively low production costs associated with Alaska Pollock and Pangasius. Additionally, a price war might also be harmful to the brand and the image of Norwegian cod. As mentioned previously, the cod is often labeled as the Rolls-Royce of the white fish due to its high quality. A low price might harm that image, and eventually lead to the perceived quality being lowered as well. Such a view is supported by Chiang and Jang (Chiang, C.-F. and Jang, S., 2007). They state that price often works as an indicator of product quality. Consumers will expect high quality when the price is high, and vice versa (IBID).

The discussion further led to the agreement that a strategy based on differentiation could be viable. This agreement was supported by statements from Bjørn Eirik Olsen, market director at Nofima (www.nofima.no #1), who claims that many European consumers have a buying power that enables them to buy Norwegian seafood even though the price level is higher compared to seafood from other countries. In order for this to happen it is crucial that Norwegian seafood has some unique attributes that differentiate them from the competing products (www.nofima.no #2). Some unique attributes is not only important for this reason. If one considers the present financial crisis as well, an additional argument for differentiating on some unique attributes is present. Because the crisis decreases the buying power of consumers, and likely makes them switch to cheaper products, some unique attributes might make them value the cod higher and make them less sensitive to price.

In the broadest sense, Norwegian cod can differentiate itself on either its physical attributes or some abstract and intangible attributes. Due to the fact that the physical attributes of Norwegian cod, Pangasius and Alaska pollock are very similar, which will be elaborated upon in a later chapter, and consequently could turn out to be a very difficult differentiation case, this was rejected. Additionally, cod is already associated with high quality meat, as exemplified by marketing manager Karin Olsen at NSEC when she stated in a conversation with the authors in March 2009 that Norwegian cod is considered to be the Rolls-Royce of the white fish segment. Combined, this would make a differentiation strategy based on physical attributes very difficult and too "into the details of the fish anatomy". The authors' therefore concluded that

differentiation based on something else than the specific physical product attributes was the most sensible solution. This was furthermore combined with our interest in branding and social responsibility. Presently, social responsibility is a very hot topic, and believed to constitute potential competitive advantages for those who embrace it. For example, Porter and Kramer (2006) support this view. They claim that a company can use social responsibility as a mean to differentiate and thereby create competitive advantages. Moreover, Porter has also argued that branding is a way for a company to create a unique differentiation (2006). Consequently, a motivation to combine these two issues, and test the applicability of using them to fight off the threat from the cheaper substitutes arose. Moreover, an academic motivation also arose due to the fact that there is, at present time, not much research done on how CSR works as a branding element. In particular, CSR as a branding element has never been applied in a case concerning cod. This project can thereby be an interesting contribution to that research field. Concerning NSEC, this thesis might provide an interesting contribution to their marketing research because it approaches CSR in a wide manner.

1.5 Research question

Based on the presentation of the market challenge, this project will investigate the potential of using CSR as an element in the existing brand strategy, with the ultimate goal of strengthening the competitive advantages of Norwegian cod. The research question of this thesis will thus be:

What potential has CSR as a branding element in the branding strategy of Norwegian cod in Denmark?

1.5.1 Sub-questions

In order to answer the research question as precisely as possible, there are five main aspects that need to be investigated. Firstly, it will be necessary to investigate the current competitor positioning, particularly in terms of CSR. Secondly, it is necessary to consider the need, or demand of CSR among the consumers of fish. Thirdly, it is important to say something about the current associations Norwegian cod has in Denmark. Fourthly, it is necessary to analyze what competencies the Norwegian cod industry possesses in terms of CSR. During the process of this thesis it was found necessary to include a perspective focusing on the future potential of CSR as a branding element as well. Due to this, and due to a managerial aspect of being

proactive, a sub-question concerning the future has be included. The sub-questions are as follows:

The following sub-question will help answering the current competitor positioning:

1. Among suppliers of fish, is CSR used as a branding element?

The following sub-questions will help answering the consumer demand for CSR:

2. Can CSR affect the consumer's point of purchase decisions?
3. How important is CSR as a buying argument compared to other buying arguments?

The following sub-questions will help answering what current associations Danes have of Norwegian cod:

4. How do Danes perceive Norwegian cod today?

The following question will help answer what unique competencies in terms of CSR Norwegian cod industry possess:

5. In terms of CSR, what unique competencies does the Norwegian cod industry have?

The following question will help answering what future potential CSR as a branding element for Norwegian cod has:

6. How is the future potential of using CSR as a branding element in the branding strategy of Norwegian cod in Denmark?

1.6 Theoretical focus

In the broadest sense, the research question and corresponding sub-questions, demand a theoretical focus on CSR and branding. Concerning CSR, it will be necessary to focus on its competitive advantage-building capabilities, and on consumers' concerns about CSR. In this project competitive advantage is viewed as a unique CSR-related branding element that affects consumers' buying behavior in a positive way. Concerning branding, it will be necessary to apply a framework that is able to evaluate the branding potential of CSR. More specifically, the branding framework needs to consider it both in view of the consumers and in view of the competitors. Additionally, the framework should be able to say something about the existing

perception of Norwegian cod in Denmark. The specific theories and frameworks will be presented and discussed in a later chapter.

1.7 Methodological focus

This research will be doing a first round of mapping CSR's potential as an element in Norwegian cod's brand strategy in Denmark. Moreover, it is an aim to help NSEC in their strategic brand management. Since this is a first round of mapping, the paper will be of an explorative kind. This will be crucial to consider when the methodological choices are made later on. It will, moreover, also be important to keep in mind the aim of providing NSEC with managerial recommendations. The methodology should therefore also be understandable in a managerial setting. Finally, it is necessary to discuss the philosophical fundament of this research, because also that has implications for what methodological choices can and should be made. A more thorough presentation and discussion of the methodology will be conducted in a later chapter.

1.8 Delimitations

In order to make a more in-depth and accurate investigation in this thesis, some delimitations have to be included. In the following the project's delimitations will be elaborated upon.

Firstly, it is not the aim of this thesis to review and evaluate the present brand strategy of NSEC. That strategy is the foundation for all marketing initiatives NSEC engage in, and should thereby not be changed. As clarified in the research question, the aim is to investigate the potential of CSR as a branding element.

This thesis aims to investigate a factor concerning the content of the branding strategy of Norwegian cod. More specifically, meaning the potential of CSR as a branding element. We thereby limit ourselves from investigating how the branding strategy is or can at best be executed. For example, it means that we will not investigate the best way to communicate CSR.

As mentioned in the introduction about NSEC, their existing brand strategy is generic. This means that it treats all production forms of cod more or less the same. It does distinguish

between the different kinds of cod available, but they are all labeled as a fish originating from the clean and clear Norwegian fjords where the fishing traditions are proud. This thesis will follow the generic approach, and thus not, unless the findings suggest otherwise, distinguish between the different kinds of cod available.

In this thesis the market of white fish in Denmark will not be analyzed and presented in detail. As mentioned before, the market situation's main mission is to serve as a motivational factor for creating and investigating the research question. However, a brief market overview will be necessary to conduct in order to give an impression of the threat cheaper substitutes are to Norwegian cod (see chapter 1.3 Market Challenge). In the market overview it will not be possible to present sales numbers for the respective white fish types. Max Nielsen, associate professor at the Institute of Food and Resource Economics (www.foi.life.ku.dk), confirmed in a telephone call that no such numbers exist for the end-consumer market. There are numbers on how much fish is sold in total on the Danish market, but they do not show more detailed information, such as how much is sold of different types. To be able to collect such numbers, it would be necessary to contact every purchaser, or grocery company in Denmark. We have chosen not to do that because such numbers are not an essential part of this thesis.

Even though segmentation of different groups of consumers is important in a branding context in order to exploit the maximum potential of consumers' needs and behavior, it will not be a focus in this thesis. This is due to the fact that this is the initial effort of mapping CSR issues that affect consumers in a purchase situation. To tailor make the CSR branding efforts to fit the different consumer segments, will be a task to be executed at a later stage.

There are also other types of cod from different producers and with different origin that could have been considered as competitors. We acknowledge that, but we are only concerned about the threat from cheaper substitutes, and in that context those fish types are not mentioned, e.g. the media statements used earlier (www.nrk.no #1) and www.nrk.no #2).

1.9 What follows?

In the first chapters we will look at the theoretical, conceptual and methodological questions that constitute the analytical framework of the thesis. Chapter 2 will present the scientific

approach through a thorough discussion of the thesis philosophical background followed by methodological choices. Then a theoretical discussion of theoretical aspects related to the case will be made in chapter 3. In this chapter the concept of CSR will be linked to branding, and establish the theoretical framework this shall be analysed within.

Chapter 4 is a short process chapter, discussing important issues related to the research. This is included to show important choices that were made during the course of the research.

In chapter 5 we will analyse and discuss the data. Each sub-question will be covered individually, before the main findings from them will be tied together in the theoretical framework.

Finally, a conclusion on the research question will be presented in chapter 6, followed by some managerial recommendations based upon the research results.

Chapter	1	2	3	4	5	6
	Introduction	Scientific approach	Theoretical approach	The process	Analysis & discussions	Conclusion & recommendations

2 Scientific approach

The following chapter will present the scientific approach of this thesis. It will start by discussing the philosophical background of the project, and after that present and consider the methodological choices made.

2.1 Scientific approach

Science is the attempts to make the chaotic diversity of our sense-experience correspond to a logically uniform system of thought. In this system single experiences must be correlated with the theoretical structure in such a way that the resulting co-ordination is unique and convincing (Einstein, 1950). Research can also be defined as systematic and methodical process of enquiry which increases knowledge (Hussey and Hussey, 1997). These are general views of research, but the area is more diverse and needs to be further defined. As natural science has developed acceptable research methodologies, there still are discussions within social science of which methodologies are most suitable. This has led to multiple available approaches in social science. There are discussions around empirical and theoretical research. One philosophical assumption is that evidence, as opposed to thought, is needed to be able to claim that new knowledge has been found. Others again argue that also theorist's work adds knowledge. Finally, some argue that the two are intertwined, and that science is dependent of both empirical and theoretical approaches (Remenyi *et al.*, 2002).

When finding the most appropriate research design, it is important to organize the research activities in ways that most likely will fulfil the research aims. This research is within social science and this gives many possible angles to reach the aims. But it is important to be aware that some designs will most likely be incomplete, and that it is all about making choices of what should and should not be observed (Easterby-Smith *et al.*, 2008). The following chapter is an explanation of which data must be gathered, and the justification of these choices. At first there will be an explanation of the philosophical background. Secondly, which data that shall be collected and how these should be treated is shown through the methodology.

2.2 Philosophical background

Before the research takes place, it is important to clarify the philosophical background. According to Easterby-Smith *et al.* (2008; p.56) a failure to think this matter over can influence the quality of the research dramatically and it plays an important part of how the design of the research will be, limiting and guiding available methodological approaches. It will also influence which evidence is required and how it should be gathered and analyzed. Easterby-Smith *et al.* (2008) identifies four main elements in the research process:

- Ontology – the perceptions about reality
- Epistemology – the perceptions about the best way to inquire into reality
- Methodology – the combination of techniques used for carrying out the research
- Research Methods – individual techniques for collecting and analysing data

Discussions about ontology and epistemology clarify which assumptions the researcher has about nature of reality and about the best way to investigate the natural or social world (Easterby-Smith *et al.*, 2008). Methodology lays the main plan, the strategy that the researcher will follow in order to carry out the research (Gill & Johnson, 2002; Easterby-Smith *et al.*, 2008). The research methods refer to the specific techniques employed for data collection and analysis (Easterby-Smith *et al.*, 2008).

Ontology of social science can be divided into how each branch looks for truth. This is done through representationalism which require verification of predictions, relativism which is determined through consensus between different viewpoints, and nominalism that is dependent on who establishes it (Easterby-Smith *et al.*, 2006).

The epistemology produce facts through positivism who are concrete, but cannot be accessed directly, relativism who depends on the viewpoint of the observer or social constructionist that view all facts to be human creations (Easterby-Smith *et al.*, 2006).

To find a suitable approach to this research, an overview of the alternative directions is considered. Through the years there have been two contrasting research paradigms within social

science. These are positivism and social constructionism¹. An important note is that these two paradigms are two extremes and in practise researchers use elements from both schools and have a pragmatic view by combining available methods drawn from both sides (Easterby-Smith *et al.*, 2008)

2.2.1 Positivism

Easterby-Smith *et al.* (2008 p.57) define the idea of positivism as “...the social world exist externally, and that its properties should be measured through objective methods, rather than being inferred subjectively through sensation, reflection or intuition.” The view is based upon an ontology assumption that reality is external and objective and upon an epistemological assumption that knowledge is only of significance if it is based on observations of this external reality. The paradigm looks upon the researcher “as an objective analyst and interpreter of a tangible social reality” (Remenyi *et al.*, 2002; p. 33). Remenyi *et al.* further claims that positivism is not reckoned to lead to profound insights into complex problems, especially within business and management studies. This is because such studies needs deeper insight than positivistic research can provide, and quantifiable observations is not sufficient to explain this complexity.

2.2.2 Social Constructionism

Social constructionism is a contrasting paradigm. It has developed through the last half century as a reaction to positivism. Easterby-Smith *et al.* (2008; p 59) defines it as: “...‘reality’ is determined by people rather than by objective and external factors”. Further it is clear that research should not be fact gathering and measure frequencies of certain patterns, but rather embrace the constructions and meanings people get through experience. When Remenyi *et al.* (2000) discuss this paradigm, a description of how the researcher is an active, involved element in the research is made. The world is stochastic and socially constructed, and there are many realities which must be accounted for. By looking at the world holistically, a deeper understanding of complicated situations is reached. Every research is a unique incidence and a phenomenon. Social constructionism is an ongoing process where early data collection shapes the next steps, and changes in the methodology can occur throughout the process. An important

¹ ‘Social constructionism’ (Easterby-Smith *et al.*, 2008) is a paradigm also known as ‘Social Constructivism’ (Guba and Lincoln, 1989 and Knorr-Cetina, 1983), and is closely related to ‘Phenomenology’ (Hussey & Hussey, 1997 and Remenyi *et al.*, 2000). Even though slightly different definitions, this research view the terms interchangeably and uses ‘social constructionism’ as the preferred term.

point to include is that this kind of research not readily can be generalized, other than the notion that if it has happened once, it is likely to occur or exist again (Remenyi *et al.*, 2000).

As seen in table 1, the two paradigms can be contrasted in terms of how to implicate them into research.

Table 1: Contrasting implication of positivism and social constructionism

	Positivism	Social constructionism
<i>The observer</i>	Must be independent	Is part of what is being observed
<i>Human Interest</i>	Should be irrelevant	Are the main drivers of science
<i>Explanations</i>	Must demonstrate causality	Aim to increase general understanding of the situation
<i>Research progress through</i>	Hypotheses and deductions	Gathering rich data from which ideas are included
<i>Concepts</i>	Need to be defined so that they can be measured	Should incorporate stakeholders perspectives
<i>Unit of analysis</i>	Should be reduced to simplest terms	May include the complexity of 'whole' situations
<i>Generalization through</i>	Statistical probability	Theoretical abstraction
<i>Sampling requires</i>	Large numbers selected randomly	Small numbers of cases chosen for specific reasons

(Source: Easterby-Smith *et al.* (2008) "Management Research" p. 59)

2.3 Methodology

2.3.1 Qualitative and quantitative designs

As stated above, particularly the ontology and epistemology has an impact of how the research is conducted and analyzed. Additionally, there are important surface characteristics between qualitative and quantitative methods (Easterby-Smith *et al.*, 2008). These are respectfully collecting data in the way of words, and in the form of, or expressed as, numbers. In terms of the philosophical background, these methods can be used by both constructionist and positivist epistemologies, and can be put under both nominalist and realist ontologies (IBID). Table 2 is an overview of which methodologies can be used under what epistemologies. One star represent potential link and two stars represent the most common relation:

Table 2: “Research methodologies mapped against epistemologies”

	Positivist	Relativist	Constructionist
<i>Action research</i>	*		**
<i>Case method</i>	*	*	*
<i>Collaborative research</i>			**
<i>Cooperative inquiry</i>			**
<i>Ethnography</i>			**
<i>Experimental methods</i>	**	*	
<i>Grounded theory</i>	*	*	**
<i>Narrative methods</i>			**
<i>Quasi-experimental research</i>	**	*	
<i>Survey feedback</i>	*	*	*
<i>Survey research</i>	*	**	*

(Source: Easterby-Smith et al. (2008) “Management Research”; p. 83; Bold added by author)

Remenyi et al. (2000) recommends that the discussion around the approach to empiricism, theoretical research, positivism and social constructionism should inspire to draw on the most appropriate to the situation, and to triangulate theories and collected data.

Inspired by this the following will discuss this research’s position and which methods should be included in the methodology.

2.3.2 Position of present research and needed methodology

This thesis will investigate CSR’s potential as a branding element in the branding strategy of Norwegian cod. Before this thesis started, both researchers had discussions about the Norwegian fish industry, and shared views of marketing and managerial aspects within the industry. During these discussions, a shared basic opinion emerged of how the market is working and how marketing and management theories could influence it. These reflections formed a basic philosophical background of this research. It was clear that in connection with this research area the researchers were having an underlying foundation leaning toward social constructivism. To best solve the research question it seems most appropriate to focus on methods within this paradigm. This does not mean that the appreciation and respect for a positivistic view is not present. This shines through as the research question is looking for a truth, which is a positivistic trait. Following is a presentation of the results of the discussions

and how this has resulted in methodologies based on the methodological theories presented previously in this chapter.

As this research aims to make a foundation for thoughts around the use of CSR in the branding strategy of NSEC, it is an unexplored area that needs an exploratory approach (Remenyi *et al.*, 2000 p. 108). Within the research area of combining CSR and branding, there is no documented research available considering the Norwegian cod export industry. As this is an unexplored area, in combination with the underlying philosophical assumptions of the researchers, the following discussion lays the strategy for the research design.

This research has a perception of reality belonging to the relativism ontology of social science. More specifically, it takes a position of having ‘critical realism’, meaning it takes into consideration both extremes in the ontological discussion, combining representationalism and nominalism. This recognizes that social conditions have an impact whether or not observed or labeled by researchers. At the same time it is open for concepts being human constructions (Easterby-Smith *et al.*, 2008). When looking at the best way to inquire into reality, the researchers of this study will have an epistemology toward social constructionism. It is dependent on the viewpoint of the observer in the way facts are being looked upon. Additionally, the CSR and branding theories used are human creations, which implicate that influence from an epistemology with social constructionism also is applicable (IBID).

Having a relativist view assumes the difficulty of gaining direct access to the reality. Therefore it is necessary to view the case from several angles and triangulate methods accordingly. As discussed above, this research tends to look upon fact as human creation. Therefore it is, according to social constructionism, more important to investigate the meanings of people through conversation. As stated in the introduction the aim is to have exposure of the CSR in NSEC’s branding strategy. The starting point is the proposed research question:

What potential has social responsibility as a branding element in the branding strategy of Norwegian cod in Denmark?

The research design will be chosen with the following five generic issues in mind (Easterby-Smith *et al.*, 2008). Firstly, there is the unit of analysis, which is the entity that is the base of the sample. This research will map the Danish consumers of fish, and as an embedded case, the

level of influence CSR can make on these. Secondly, this research will look at the case as local knowledge, rather than a generalized universal theory. This means that the study will be understood in relation to the context of the Danish market. As a third element, the researchers will make themselves familiar with existing theories before the data collection, but recognize the possibility of looking at other theories if the data collection suggest such a thing. This means that branding and positioning and CSR theories are gathered and the data-collection is influenced by these. A fourth element is the choice of doing an in-depth study. As the study aims to explain why CSR shall be an element in the branding strategy, it is more appropriate to follow reductionism in the approach. This gives a limited number of observations and a somewhat low level of unit of analysis. Finally, this research will be conducted in the spirit of critical sensitivity and critical subjectivity, as advised by Alvesson and Deetz (2000). This means that it is recognized that the researchers' views and experiences can influence the research, but that they at all times bear in mind this fact and seek not to let these overwhelm the research. One should therefore be sure of looking for indications which can enlighten the research question in any way.

The design will follow a social constructionism thought of methodologies. The aim is to develop a basis for NSEC to decide if their branding strategy in Denmark shall involve more focus on CSR. The starting point is those meanings given in the introduction, where there is a social construct that CSR increases in importance for people. This will lead to a design which include techniques from social constructionism and emphasis on conversations which must be interpreted by sense-making. The outcome is a deeper understanding of CSR, branding and positioning, and the case of Norwegian cod export to Denmark. This then suggest that this research shall use the following implications (Table 3; implications in bold):

Table 3: "Methodological implications of different epistemologies within social science"

	Positivism	Relativism	Social constructionism
<i>Aims</i>	Discovery	Exposure	Invention
<i>Starting point</i>	Hypothesis	Proposition	Meanings
<i>Designs</i>	Experiment	Triangulation	Reflexivity
<i>Techniques</i>	Measurement	Survey	Conversation
<i>Analysis/interpretation</i>	Verification/falsification	Probability	Sense-making
<i>Outcomes</i>	Causality	Correlation	Understanding

Source: Easterby-Smith *et al.* (2008) "Management Research" p. 63; Bold added by author)

Having the above discussion in mind, the following is combining this with the discussion of methodology. As seen in Table 3, there are several possible methodologies covering the discussed epistemology. This research will use a case methodology to uncover the research question. This because it seems best suited as this research is commenced in a real life context and wants to provide a rich picture of the case. At the same time it will take into account that the research question search for the ‘one’ truth, belonging to the positivistic paradigm.

2.3.3 Case study

A case study research is an exploratory form of method defined by Yin (2003: 13-14): “... *investigating a contemporary phenomenon within its real-life context, especially when the boundaries between object of study and context are not clearly evident. It copes with the technically distinctive situation in which there will be many more variables of interest than data points, and as one result on multiple sources of evidence, with data needing to coverage in a triangulating fashion, and as another result benefits from the prior development of theoretical proposition to guide data collection and analysis.*” Dul and Hak (2008) highlight the case study to be conducted in a non-manipulated setting, which is analysed in a qualitative manner. The research aims to give a rich view of NSEC’s reality. A social constructionism view is taken, which opens for an emergent design, using multiple methods analysed within the case. The design is decided at the start of the study, but is flexible throughout the research (Easterby-Smith *et al.*, 2008). By using case study, the researchers feel that the triangulation of methodological designs can best be covered. Such an approach is supported by Siggelkow, who suggests this kind of method when aiming to inspire to new ideas and illustrate abstract concepts (Easterby-Smith *et al.*, 2008).

Dul & Hak (2008) show an approach of theory-oriented or practice-oriented case studies. This research’s goal is to aid NSEC in their strategic brand management, and is therefore a practice-oriented research. A practice-oriented approach can be divided into hypothesis-testing research, hypothesis-building research, and descriptive research. This research explores and describes a possible opportunity for a stronger positioning in the market, namely CSR. However, it can possibly be a basis for future hypothesis-testing research and thereby be viewed as hypothesis-building. Such hypothesis building will not be the main goal of this research, but will be mentioned in a future research chapter if applicable.

2.4 Initial research strategy and research methods

To answer the research question, the case methodology opens for more than one method to be used. The following will discuss and uncover those methods which suit the study best, also considering the research resources available. The methods chosen are based on the philosophical background and discussions previous made in this chapter. To see the method used in light of the methodology approach, will give transparency which is requested as part of the thesis' validity, a subject reflected upon later in this chapter. A step-by-step presentation is made of the initial thesis approach, including choices of method and the reasoning for them. To add to the transparency, the methodology in the introduction chapter is also included in this presentation. To justify the choice of qualitative methods, the approach of Marshall & Rossman (2006) is taken. They recommend such methods when the research looks to: "*elicit multiple constructed realities, studied holistically*", "*research that delves in depth onto complexities and process*", "*research on little known phenomena or innovative systems*" and "*research for which relevant variables have yet to be identified*" (Marshall & Rossman, 2006 p. 53). This study can be seen to be of such a type.

2.4.1 The introduction

At first this study had to develop the background and establish the research question. This was done in cooperation with NSEC. The goal of these discussions was to discover a research area which could be academically innovative, beneficial for NSEC's strategic work, and challenging and interesting for the researchers. It started off with NSEC's Director Jan Trollvik, which led the discussions toward the market situation of Norwegian cod and interesting thoughts about consumer health issues. The discussion was continued on phone and in person with marketing manager for whitefish, Karin Olsen, which introduced up-to-date challenges within CSR and market needs. This, in combination with the existing NSEC brand management strategy and the interest of the researchers, led to the main challenge in the research question.

2.4.2 Theoretical approach

Looking at the theoretical approach, it is clear that CSR and branding are two key elements in the research. A literature review must therefore be made, to uncover existing theory in these areas and which of these could suit the case best. This is done through electronic search on the library sites of Copenhagen Business School and BI Norwegian School of Management. It will lead to academic books and journals covering established theory on the mentioned subjects. The

data shall be gathered in a systematic review. By establishing an account at www.refworks.com, an overview of the references is made.

2.4.3 Data collection

2.4.3.1 Step 1 – Case related literature review

In order to get an overview of what is going on in the market, there will be conducted a literature review, gathering secondary sources such as books, reports and articles from industry media and public agencies etc. The review should also include market data from public accessible databases, industry journals and from research companies willingly wanting to share such. Additional information will also be gathered through www.google.com, being critical of the sources. For journals and information found through electronic sources, a file system will be developed based on key terms, and interesting web-sites filed in favourites in the internet reader Internet Explorer. Secondary sources will, together with the theoretical choices made, establish the knowledge base for the expert interviews done in the following stages. The secondary data is also used directly in the analysis and discussions to draw a more complete picture of the case.

2.4.3.2 In-depth-interviews

In step 2 and 3 the method used is in-depth-interviews. They are all based on the following discussion of how an in-depth-interview shall be conducted. Easterby-Smith et al. (2008, p. 145) state that an in-depth-interview is appropriate when *“the aim of the interview is to develop an understanding of the respondent’s ‘world’ so that the researcher might influence it, either independently, or collaboratively...”*. This suits the research aim, as the researchers, in collaboration with NSEC, will map and uncover possibilities to influence the use of CSR in this ‘world’. The overall aim with the interviews is to have *“a conversation with a purpose”* (Kahn and Cannell phrased in Marshall and Rossman, 2006. p. 101). Furthermore, the focus on in-depth interviews *“will capture the deep meaning of experience in the participants’ own words”* (Marshall & Rossman, 2006, p. 55). This thesis aim to conduct interviews which Marshall and Rossman (2006) call elite interviews. These kind of interviews are conducted with a particular type of interviewees considered influential and well informed in an organization or community and are selected based on their relevant expertise connected to the research. This is done to achieve advantages such as gaining valuable information because of their position in the organization and get an overall view of the organization or the relation to other organizations. Moreover, such interviews are an advantage when the research is in an exploratory phase (IBID). Furthermore, Marshall & Rossman (2006) find it as an advantage, because interviewees

in elite interviews are considered to be more willing to cooperate and exchange than regular interviewees.

Easterby-Smith et al., (2008) have six in-depth-interview issues. First of all it is important to build trust. This will be done by investigating the company and interviewee in order to have knowledge about their situation. Secondly, the way the interviewee thinks of the interviewer can influence the level of honesty and their urge to share their knowledge. This is dealt with by paying especially attention to the introduction stage when the first impression is made. The language used will be formal and friendly, and adapted to the way the interviewee is communicating. This is to make sure that the interview is taken seriously, and to ensure that all involved parties are on the same level. To get access is a fourth issue. The authors will use their contact with NSEC as a gate opener, and if needed, personal contacts to make introductions. In order to ensure credibility, the institutions the researchers represent, CBS and NSEC, will be presented when approaching potential interviewees. When access is granted, all interviewees will receive a document with more details of the interview topic and some key questions that will form the discussions. According to Easterby-Smith et al. (2008), a document like that will increase the likeliness of a successful data gathering. This works as a topic guide, but will not be a document which ties up the discussion. To relax the interviewee, this document will also emphasize that the discussion will be an informal talk, even confidential if desired, to create a trustful and relaxed atmosphere. Fifth, there is the issue of interview location. The interviews are preferred to be done face-to-face and on the interviewees' premises. Finally, there is the issue of recording interviews. This will be done, but the interviewees will also have the opportunity to go off-record.

Marshall and Rossman (2006) also warn about how experienced interviewees are trained in handling interviewing and might answer open-ended questions in a rehearsed manner. They might also take charge of the interview process and lead away from the intention from the researcher. It is often demanded that the interviewer can prove credibility through knowledge and through thoughtful questions. This will be done through a thorough literature review. Each interview will be adapted to the person, and an individual interview guide will be developed. The interviews will by this be semi-structured and use open-ended questions (Easterby-Smith et al., 2008). The open-ended questions will be followed up by laddering, and if there seems to be more information available, probes will be used.

The interviews will be interpreted in accordance with the philosophical and methodological background previously discussed. The goal is to interpret the data in a way which can tell the story in a fully convincing manner to the reader. The data will not be presented as a whole, but shown through quotations and minutes. In a social constructivism manner the analysis will attempt “not to draw a distinction between the data collection and its analysis and interpretation” (Easterby-Smith et al., 2008, p. 172).

2.4.4 Step 2 - Mapping the value chain

As the basis of the research is clear, a deeper understanding of the market of investigation is needed. Defining the market will initially be done through secondary data research on the field of Norwegian cod export and Danish white fish market. This will be done through analysis of the competition.

Then a further market investigation of the Danish market will be made through an interview with an expert on Danish fish consumption. This interview aims at gaining insights into which factors matter when a Dane consumes fish.

The Danish market investigation will be followed by an in-depth-interview with an expert from the ‘Norwegian side’ of the cod value chain. To best cover the value chain, the interviewee shall represent the external side of the production, e.g. a governmental representative. The selection of the interviewees will be done by mapping a key player in the industry and get hold of a person who holds substantial information on the subject. For convenience, and due to resource restrictions, it is necessary that the interviewee is situated in the Oslo region. The aim of the interview is to get a deeper understanding of the cod value chain, and give input to the analysis of the sub-questions developed in the problem statement. The interview will be conducted as stated in the ‘in-depth-interviews’ section above. At this point the key questions constructed shall be based on the investigated theories and gathered primary and secondary data.

2.4.5 Step 3 – Key stakeholders; Danish Purchasers and Cod Producers

After mapping the value chain, more specific data shall be gathered through in-depth-interviews with key stakeholders in the value chain. Firstly, this will be done through interviews with Danish purchasers and a producer of Norwegian cod. On the purchaser side, an interview with a representative from a big chain, which covers all types of grocery stores, will be conducted. This will gather information from all types of grocery segments. To be sure to include the

segment of customers buying fresh fish, an expert interview with a manager of a fish store shall also be conducted. The production side shall be represented with a producer which controls large parts of the Norwegian cod value chain. This will make sure that a more accurate picture of the value chain is made, and will make sure that an industrial view is included.

The approach will be as in step 2, where guiding questions shall be developed in order to cover necessary theoretical topics, and to get a more systematic discussion. Both of the thesis' authors will be present. One will be in charge of working through the guiding questions and reveal additional information, while the other will make notes and provide comments and additional questions if necessary. Due to financial limitations, the interviewee selection will be based on geographical closeness to Copenhagen and Oslo.

2.4.6 Step 4 – Additional data needed?

As a final stage in the data collection part, it shall be reflected upon if there is sufficient data gathered to start the analysis. If this is not the case, there shall be done further investigations until enough data is available to make analysis which can answer the research question. This decision will be discussed after steps 1 through 3 have been conducted.

2.4.6.1 Transcription of data

The transcription of data will follow the recommendations for how to work with expert interviews made by Van Audenhove (www.ies.be). The interviews will be presented in summaries where different themes and thoughts will be highlighted in separate labelled paragraphs. This is important in order to make it easier to identify thematic similarities and differences among the interviewees. Since we are dealing with expert interviews, it will not be important or relevant to take into consideration non-verbal communication, pitch of voice etc. Additionally, the interviews will be available on an attached CD. This is in line with the thoughts of Kvale (1996) which looks at interviews interpreted by the interviewer. This should be done by, firstly, structuring the large material gathered, and then to clarify and highlight the essentials in the material, making it ready for analysis. This will be done by taking notes during the interviews, and revisit the audio to confirm and expand the notes afterwards. Then these notes will be gathered in minutes, clarifying the essentials.

2.4.7 The discussion and conclusion

The proper analysis will follow the transcription and shall develop the meanings of the interviewees and take perspectives from the researchers on the case into account (Kvale, 1996). This will be done through what Kvale define as ‘meaning condensation’. This “entails an abridgement of the meanings expressed by the interviewees into shorter formulations. Long statements are compressed into briefer statements in which the main sense of what is said is rephrased in a few words”, (Kvale, 1996; p. 192). The minutes are used as ‘natural units’, and are basis for analyzing into central themes, and then analyzed and discussed in light of the research question.

The secondary resources will be analyzed in a similar way, drawing the essential information into central themes, and then use it together with the primary data in the discussion.

The discussion will be done with the sub-questions introduced in the problem statement as a framework. Each sub-question will be discussed in light of gathered theoretical and market data. Furthermore, each sub-question will have its own conclusion, which summed up will enlighten the research question. The discussions will have a managerial angle, and will aim to be done in such a manner that it easily can be read as an own document. By that it can more easily be an input in the brand management strategy of NSEC.

Following the discussion of the sub-questions, all the most important findings will be pulled together to answer the research question through a theoretical framework.

The thesis’ strategy can be presented in the following figure (Figure 1):

Figure 1		Chapter	Research Heading	Research Methods
Introduction	Introduction	1	Research Background	Secondary sources Expert interviews
	Methodology	2	Methodology	Literature review
	Theoretical approach	3	Theoretical approach	Literature review
Data collection	Step 1 Case related literature review	2	Case related data	Secondary sources
	Step 2 Mapping the value chain	2	Danish Whitefish Market	Secondary sources
			The Norwegian industry	Expert interviews
	Step 3 Key stakeholders in the value chain	2	Danish Purchaser – Grocery store	Secondary sources
			Danish Purchaser – Specialist Store	Expert interviews
			Norwegian Production	
	Step 4 Additional data needed?	2	E.g. Danish Consumers	Customer Interviews Other data
Further	Analysis & Discussion	5	Sub-questions Research-question	
	Conclusions & Recommendations	6	Sub-questions Research-question	

2.5 Research validity, reliability and generalizability

This research leans toward a social constructionism viewpoint. Easterby-Smith et al. (2008) have proposed some perspectives of how such a research can best hold high validity and reliability, and some thoughts of generalizability. The validity looks for if the study clearly gains access to the experiences of those in the research setting. As for reliability it is important to consider if there is transparency about how sense was made from the raw data. When it comes to generalizability, a research leaning towards constructionism does not recognize the results as being generalizable to the extent which other epistemologies do. However, as Easterby-Smith et al. discuss, the concept and constructs which the study have, can be of relevance in other settings and thereby generalizable. These points will, at a later point, be discussed with these thoughts in mind.

2.6 Research weaknesses

There are some weakness issues which are important to mention when using the above methodology and methods. This research will recognize these, and do the very best to avoid that such weaknesses will have an impact on the results.

Easterby-Smith et al. (2008) labels social constructionism as good for process and meanings. It is flexible and the data collection is less artificial. However, they also recognize that it can be very time consuming, and analysis and interpretation can be difficult. The researchers feel the choices made from the philosophical and methodological background suits the case well, and will be possible to commence with the resources available. Some argue that this kind of approach does not add any value to management decisions as it does not include numeric analysis and therefore is not valid. This seems to the researchers as a narrow view, and does not comply with the approach taken in this research. There is a clear plan of how the data shall be interpreted, and it is explained in a transparent manner. This makes the analysis easy to deal with when the data is collected. There is nothing which is not revealed to the reader, managerial responsibility or not, and they should therefore not have any doubts of the credibility of the research.

Silverman (2005) points out that using multiple methods can be challenging, and the difficult-level is based on the analytical framework used. Silverman refer to Fielding & Fielding's work

from 1986, which claims that the use of triangulation in social science should always begin from a theoretical perspective or model, and methods chosen should give an account of structure based on this theory. Silverman also warns of methods aiming to reveal the ‘whole picture’, as it easily can lead to under-analyzed and an indigestible research question. Also it must be avoided that the researcher just move on to the next data set if he find analyzing the data difficult. This research has taken these thoughts into account, and is based on a theoretical framework, limits the research question to one market and suggests the findings only to be a first mapping of the phenomenon. All gathered data is considered, as it is viewed that even the little things can contribute to the discussions.

The in-depth interviews are conducted by, to some degree, inexperienced interviewers. They have conducted some semi-structured interviews during their academic career, and one has done close to a hundred hour long approval interviews of exchange students. However, the lack of experience the researchers possess at this level must be considered in terms of the interview results. To avoid letting this influence the findings, the researchers have prepared in detail background information, and attempted to plan as many interview-scenarios as possible.

2.7 The Interviews

The following is a presentation of how the six interviews where conducted. It aims to cover the six interview issues stated by Easterby-Smith et al., (2008):

1. How trust was built between interviewer and interviewees
2. How a good impression was attempted built toward the interviewee
3. In what tone the interview was conducted in
4. How the access to the interviewee was granted
5. Where the interview was located
6. How recording and transcript of the interview was done

2.7.1 Telephone interview with Lone Marie Eriksen

(Project coordinator, “Fish twice a week” - Fiskebranchens Oplysningsudvalg) conducted 25/5-2009. Duration 40 min.

As the expert’s schedule did not have room for a face-to-face meeting, a telephone-interview was conducted. A set of open-ended questions was e-mailed a day before the interview

(Appendix 2). This was to make sure that the interviewee was well prepared. Additionally, an interview guide was developed (IBID). The interview was conducted at a time best suiting the interviewee, so she could plan to be in a suitable location when being interviewed. Before the interview, a research of the background of the interviewee was done. All communication was done in a polite and business-like manner, and the interview had an informal tone where laddering and probes came natural. The initial contact was done through e-mail, using CBS and NSEC as gate openers. The interview was not audio-taped as no such equipment was available to the interviewer. A transcript and minutes can be found in Appendix 7.

2.7.2 Face-to-face interview with Svein Halbjørn Steien

(Vice President/veterinarian AVSF, Innovation Norway) conducted 4/6-2009. Duration 1h 45min.

Trust was made through preparation of an interview guide (Appendix 3), and by a review of the interviewee's background. In addition, a search of previous public statements in newspapers and such was conducted. Literature review gave a knowledge base of key CSR phrases. These were made in order to contribute to the interview if necessary. The interviewer was dressed business casual and approached the interviewee in a professional manner. A formal introduction was made to state the aim of the interview. The atmosphere developed into an informal and straight forward conversation. There was little use for the supporting key words and value chain figure. Laddering and probes on the responses given from the interview came natural. The interview was taped, but unaware to the interviewer, stopped after one hour (Appendix 15 Track 1). This must be put on the tab of the inexperienced researchers. The interview was transformed into minutes which can be found in the Appendix 8.

2.7.3 Face-to-face interview with Nicole Linde Jensen

(Category Planner Fish, COOP Trading Denmark) conducted 8/6-2009. Duration 1h 30min.

The interviewee was reached after reviewing grocery chains on the Danish market. Contact was made to Coop's main office by telephone and they referred to their category manager responsible for fish. Background information on the interviewee was gathered before approaching her through e-mail, and an interview guide was made (Appendix 4). CBS and NSEC was used as gate openers. A few days before the scheduled interview, an e-mail with open-ended questions was sent (Appendix 4). The interview was conducted at Coop Denmark's premises, at Jensen's office. The interviewers made a formal introduction, stating the aim of the

interview. It turned into a reasonable informal conversation based on the open-ended questions, and laddering was used where applicable. The interview was audio-taped (Appendix 15 Track 2). Based on the audio-tape and notes, minutes were made (Appendix 9).

2.7.4 Face-to-face interview with Jesper Lehmann

(Fishmonger, director and purchaser in Boutique Fisk)

Conducted 13/6-2009. Duration 1h.

To get a full picture of the purchasers' attitudes toward our topic, it was decided that a fishmonger also should be approached. Through www.fiskehandlerne.dk contact was made by e-mail to one of the board members and fishmonger, Jesper Lehmann, using CBS and NSEC as gate openers. He was willing to contribute to the research, and a meeting was scheduled to a Saturday morning in his store, as this is the period with the least customers. The same interview guide was used for this interview as for the previous with Nicole Linde Jensen (Appendix 4). Consequently, the same open-ended questions were sent by e-mail before the interview took place, with a few adjustments based on experiences from the previous interview. The interview was conducted in the back room of the store, paused three times as Lehmann served customers. The tone was informal throughout the interview, and laddering and probes came natural. An audio-tape of the interview is available in Appendix 15 Track 3). Based on the audio-tape and notes, minutes were made (Appendix 10).

2.7.5 E-mail interview with Espen Tind Nordberg

(Program Coordinator Department of Sustainable Consumption, WWF) conducted 15/6-2009

As the previous interviews indicated, the importance of NGOs as stakeholders in the value chain, and their influence on consumers, made it appropriate to investigate their attitudes as well. It seemed most appropriate to contact WWF Denmark, as WWF is contributing to the certification of sustainable fisheries, and plays an active part in the discussion of CSR throughout the world. Nordberg was contacted through telephone, and followed up through e-mail. CBS and NSEC was used as gate openers when presenting the topic. His busy schedule left questions delivered and answered through e-mail as the only possible way to communicate, limiting the possibility to conduct laddering and assuring that the questions were understood correctly. An interview guide was made (Appendix 5). The interview minutes is presented in Appendix 11.

2.7.6 Face-to-face interview with Morten Hyldborg Jensen

(Executive Vice President Sales and Marketing, Aker Seafoods) conducted 9/7-2009.

Duration 1h 30 min

Finally, an interview with a producer was necessary. To include as many elements of the value chain as possible, a company controlling it from catch to the Danish purchasers was preferred. This was found in Aker Seafoods. To reach a person as high up as possible in the organisation, a “snowball” selection was made, asking former interviewed Svein Hallbjørn Steien for suggested contact persons in Aker Seafoods. His recommendation correlated with personal connections of the interviewers (Line Kjelstrup), who voluntarily worked as a gate- opener. The interviewee was reached by telephone, and an e-mail with interview topic was sent (Appendix 1). The tone in the communication was casual, which made it natural to conduct the interview in the same manner. An interview guide was prepared (Appendix 6). The interview was not taped at the request of the interviewee, and the minutes are based on interviewers’ notes (Appendix 12).

3 Theory

This chapter will present the theories that will form the framework for answering the research question. As mentioned before, the two main theoretical categories will be CSR and branding. These will be presented in turn, starting with CSR. It will not be sufficient to look at the two categories in isolation. Also links between them must be presented and discussed in order to provide a solid framework. Therefore as a starting point, a brief review of previous research linking CSR and branding will be conducted.

3.1 Research review – the value of present research

Before the research can begin, it is important to find where it can be placed in the academic world. A review of existing research looking at how CSR and branding can relate has been done and is presented in the following.

Linking CSR and branding is an area which has received limited academic attention. Such research usually, as Blumenthal and Bergstrom (2003) support, aims to give guidelines of how to communicate CSR as a brand element (e.g. van de Ven, 2008).

Blumenthal and Bergstrom (2003) did one of the first attempts to uncover the relationship between corporate social responsibility and branding. Their methodology focused on telephone and e-mail interviews with brand experts, supplemented with a comprehensive secondary research. Their research uncovers some basic reasoning for integrating CSR into branding, being:

- recognizing the magnitude of the brand promise
- maintaining customer loyalty
- maximizing investment that would be placed in CSR regardless of the brand
- avoiding conflict with shareholders

The research uncovers why CSR should be a part of the branding and how it can be communicated.

Klein and Dawar (2004) base their research on academic work proving that CSR has impact on product-brands, and that there is a ‘halo-effect’ from CSR attributes to the product. This is the

basis of their research, showing a strong impact on customers' attributions when negative CSR events occur. However, this is just the case for those consumers actually paying an interest to CSR issues.

Anselmsson and Johanson (2006) have through literature review and in-depth interviews looked at CSR from an 'internal' perspective, aiming to find attributes important to consumers in a grocery store setting. These attributes are then used in mapping CSR positioning. The greatest overall CSR impact is product responsibility, while human responsibility influence purchases intentions the most. Environmental responsibility seems to influence the CSR image the least. Important to our research is the fact that CSR can be distinctly positioned according to other attributes than price. The research is based on retail brands, but the idea can be transformed into other areas such as the whitefish market.

Global brands' integration of CSR in their branding strategy is researched by Polonsky and Jevons (2009). They stress the need for more research on incorporating CSR in brand strategy. Their angle is to review CSR literature with three types of complexity; issue, organisation and communication. Their discussion of 'issue' suits as a starting point and inspiration for our research, as it reveals the importance of determining the scope of issues to be considered and the importance the stakeholders give CSR. In addition their 'organisational' discussion raise issues around CSR as a core platform, and how needs differ from local market to local market in a global perspective. This view supports the need for looking into one particular regional market, in our case Denmark.

As seen, there has been done some academic research on the area in question. The focus has been on establishing the importance of CSR in a branding setting, and how it can be communicated. Looking at important CSR attributes has only been done by revealing attribute categories and that these can contribute in the brand positioning. CSR issues important for global brands opens for the present research contribution to the discussion of issue complexity, suggesting Keller's Customer Brand Equity (1993) as framework for revealing those CSR attributes important to customers for a particular brand. Further it can establish a first attempt of finding the most important CSR attributes on the Danish whitefish market, and to contribute to the discussion around CSR issues in the Norwegian cod industry. Most research done in the field is based upon qualitative methods, having an explorative angle, which is appropriate in an

unexplored research area like this. Our research follows this trend, as the Danish whitefish market is unexplored in relation to CSR and branding.

3.2 Corporate Social Responsibility

Corporate Social Responsibility (CSR) can be defined as *“the duty to create wealth by using means that avoid harm to, protect, or enhance societal assets”* (Steiner, George A. and Steiner, John F., 2003). As the definition is very broad it implies that CSR can take many forms. Both idea and practice have broadened over time. Generally speaking, the discussion on which form CSR can take is often related to whom, or what, one believes the company has a responsibility towards.

CSR in classical economic theory states that the corporation is socially responsible when maximizing profits while operating within the law. This view has its foundation in Adam Smith’s classical *Wealth of Nations* (1776). Its main belief is that the free market takes care of maximizing the utility of the society by maximizing the profits of the actors in the market. Thereby a socially responsible firm is the one that is concerned about strengthening its bottom line. The view also implies a high degree of self-interest, which has attracted a lot of skepticism. Freeman and Evan, for example, argue that *“the company should be managed for the benefit of its stakeholders”* and that *“the very purpose of the firm is ... () ... to serve as a vehicle for coordinating stakeholder interests”* (Rodin, David, 2005; Evan, W. M., and Freeman, R. E. 1996). This in turn, has led to newer and broader views on what a socially responsible company should be concerned about (Steiner and Steiner, 2003). This broader view will be further elaborated upon in a later section.

3.2.1 CSR – a short historical overview

According to Steiner and Steiner (*“Business, Government and Society”*, 2003), CSR started with simple charity activities in the colonial USA. Firms gave money to churches, orphanages and poorhouses, which in turn earned them respect. Even though positive outcomes could occur from engaging in charity activities, it was not common among firms to engage much in such activities. It was more an activity limited to the entrepreneurs and owners of the firms.

As the industrialization made its entrance in the 1800s and affected all sides of society, it also led to a broadening of the concept of social responsibility. This was, for example, due to the fact

that industrialization boosted growth in businesses, which thereby increased their power in the society. Moreover, industrialization also created massive social problems, which put pressure on businesses to do more (Steiner and Steiner, 2003).

By the 1920s, three interrelated themes emerged to justify broader responsibility (Steiner and Steiner, 2003). First of all managers had the roles as *trustees*. By that, it means that they were agents whose roles put them in positions of power over the fate of not only stockholders, but also customers, employees and community. Most importantly, they had a duty to promote welfare to each of the mentioned groups. Secondly, the role as agents and welfare providers also meant a responsibility of balancing the needs of the different interest groups as good as possible. Thirdly, many managers also believed they served society by making each business profitable. If they all succeeded, it was believed that the aggregate effect would eradicate social injustice, poverty and other ills (IBID). This last belief, however, can be argued to just be an alternative way to present the classical theory of profit maximization.

In 1954, a very influential work on the idea of modern CSR was made. In his book, *Social Responsibilities of the Businessman*, Howard R. Bowen claimed that managers knew that the public expected them to act in ways that went beyond pure profit maximization, and that they actually were doing it to. Moreover, he presented five basic arguments for social responsibility: 1. managers have an ethical duty to consider the broad social impacts of their decisions. 2. businesses are reservoirs of skills and energy for improving civic life. 3. corporations must use power in keeping with a broad social contract, or lose their legitimacy. 4. it is in the enlightened self-interest of business to improve society. 5. voluntary action may head off negative public attitudes and undesirable regulations (Steiner and Steiner, 2003).

In the wake of Bowen's book two specific CSR paradigms were born. One paradigm has a narrow view, where the well-being of the shareholders is the main responsibility of the firm. Another paradigm has a broader view, where all stakeholders affected by the firm's doings should be of concern.

3.2.2 The narrow view – the shareholder approach

Probably the most famous defender of this approach is Milton Friedman (Steiner and Steiner, 2003; Friedman, Milton 1970). He argues that the manager is an employee of the owners, and is therefore only responsible of helping them making as much profit as possible. The only

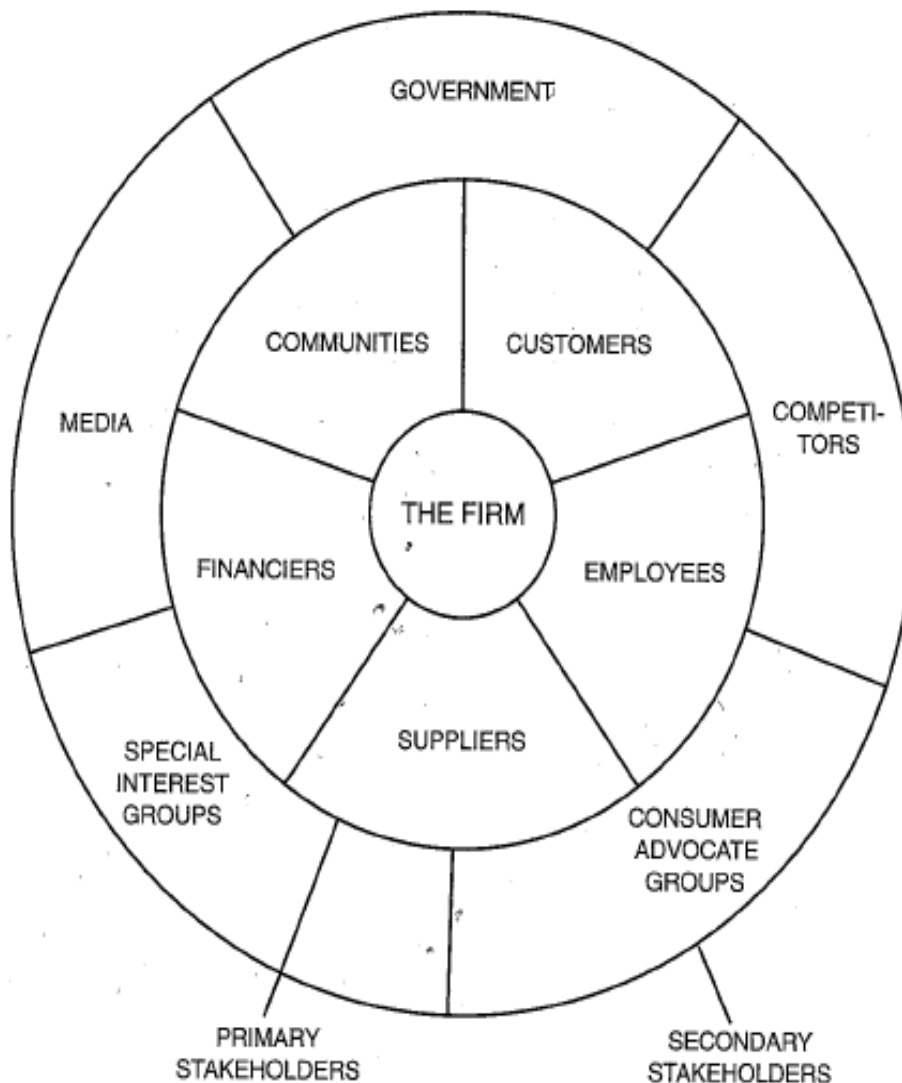
additional obligation to profit maximization is to stay within the rules of the game. If the manager uses company capital to engage in social activities that are not profitable, it would be like stealing the stockholders' capital. This implies, however, that it is not wrong to engage in social projects. The only prerequisite to do so, is if it can increase the shareholders return on investment. In reality it actually means that it is the shareholders who make the decision of engaging in CSR activities, such as charity.

Moreover, Friedman (Beauchamp et al, 2008) believes that a contract between the firm's stakeholders makes the owners entitled to the firm's profit. This is so because a product or a service is the result of productive efforts of employees, managers, customers, suppliers, the local community and the stockholders. These different parties, will, in different ways, be paid for the work they do. The root of this payment is to be found in the capital the shareholders invest. The investment is risky and therefore shareholders are, by contract, entitled to a financial return on investment. Friedman believed that those contractual agreements maximized economic freedom (IBID).

A last point worth noticing from the shareholder view, is that businesses engaging in CSR activities for the activities sake, are not executing their proper function in the society. By engaging in such activities *"executives are transformed into civil servants and business corporations into government agencies, thereby diverting business from its proper function in the social system"* (Shaw, William H, 2005). This means that CSR issues are mainly the task for governmental and other public institutions to solve.

3.2.3 The broader view – the stakeholder approach

In the broader view, which can also be labeled the stakeholder approach, the corporation must not only consider the obligations it has to its owners. Equally important are also the obligations it has to its other stakeholders. Stakeholders can be defined as *"those whom the firm's operation has benefited or burdened; that is, they have a stake in it"* (Steiner and Steiner, 2003). One of the pioneers behind this point of view, R. Edward Freeman, states that managers have an ethical responsibility to all stakeholders (Beauchamp et al, 2008). Furthermore, stakeholders can be classified as either primary or secondary, depending on how closely they are affected by the corporation's operations. Beauchamp, Bowie and Arnold (2008) have presented the following overview of the primary and secondary stakeholders of a firm (Figure 2):



Source: R. Edward Freeman, Jeffrey Harrison, and Andrew Wicks, *Managing for Stakeholders* (New Haven: Yale University Press, 2007).

Source: Beauchamp, Tom L., Bowie, Norman E. and Arnold, Denis G., *Ethical Theory and Business*, 8th Edition (Upper Saddle River (NJ): Pearson Prentice Hall, 2008)

The figure is valuable to have in mind because it depicts the broad approach to CSR this thesis must have. There are many stakeholders that are being affected by a company's doings, and thereby many CRS issues connected to it. Additionally, the figure might guide the selection of the different stakeholders to be interviewed.

For a manager managing from a stakeholder perspective the main target is to harmonize the interests of the primary stakeholders. The primary stakeholders will be of greatest importance

because they are “*groups without whose support, the business would cease to be viable*” (Beauchamp et al, 2008). The group in the outer circle, labeled secondary stakeholders, will also be of importance, but in a more indirect way. Amongst others, they will be able to affect the primary stakeholders, which in turn will have consequences for the firm.

As one can read from the figure, the shareholders are still a crucial group for the firm. Taking a stakeholder approach to CSR should not mean focusing less on the owners, but including the responsibility for other groups in addition to the owners.

A second interesting implication that can be drawn from the presentation of the shareholder approach and the stakeholder approach is that they often can take the same actions. It is the motivation behind the action that differs. The narrow view would typically treat the stakeholders well because it would lead to increased profits. The broader view would treat the stakeholders well not because it would mean extra profits, but because it would be the right thing to do (Beauchamp et al, 2008). Extra profits would just be a positive by-product of the action.

3.2.4 CSR today – narrow or broad?

Following the presentations of the narrow and broad view of corporate social responsibility, the next question to arise, is what approach is most suitable in today’s business environment? This will be relevant and important to answer because it contributes to the discussion of where this project is positioned.

As argued by Freeman (Beauchamp et al, 2008), the modern business corporation has emerged as one of the most important institutions in society and as one of the most important innovations in human history. Previously, doing business basically meant buying raw materials from suppliers and converting them in to products before selling them to customers. Moreover, most businesses were usually family-controlled with mostly family members working there. In such relatively uncomplicated cases, a narrow view of corporate social responsibility could be sufficient. However, as modernization came along with new technologies, new ownership structures, broader employee bases and so on, so did increased responsibility of the firm. The increased responsibility was a natural consequence of more groups being affected by the doings of the firm (IBID). That more groups are being affected by the doings of the firm, and that that led to increased responsibility, can also be found if one looks at the Norwegian cod industry.

Aker Seafoods for example, one of the biggest actors within the Norwegian cod industry, execute fishing activities in Norwegian waters, have processing activities in Denmark and sell the products worldwide (www.akerseafoods.com). That means that the company must relate to many different interest groups in many different countries and cultures. Moreover, the fish industry in general is also affected by a CSR issue that not only has consequences today, but also in the future. The specific issue is sustainable fishing. The Marine Stewardship Council, an organization working for sustainable fisheries, defines it as “*fish for today, fish for tomorrow*” (www.msc.org). The definition implies that fish companies must execute their operations so that they do not harm the marine ecosystems and thereby jeopardize the existence of fish. Additionally, their fishing activities must be regulated by quotas so it is ensured that also future generations of humans have access to this resource.

The complexity of the business world has further been increased by globalization. Today, corporations must not only relate to customers, suppliers, owners and other institutions in their own local market, but they must also relate to the same groups in other countries and cultures. As with modernization, also globalization implies increased responsibility of the firm because more groups are being affected by the company's operations.

As previously mentioned, firms have become one of the most important and powerful institutions in society. As a consequence of increased power, increased responsibility should follow too (Beauchamp et al, 2008). Keith Davies argues: “*modern business has immense social power...()...If business has the power, then a just relationship demand that business also bear responsibility for its actions*” (Shaw, 2005). Furthermore, he argues that it is no longer possible to make decisions out of purely economic motives because businesses today are interrelated with the whole social system. A socially responsible company is thus the company that is able to make decisions that serve not only business interests, but also decisions that protect and enhance the interests of society. The net effect is to improve the quality of life in the broadest possible way; a quality which is defined by society (Shaw, 2005).

Melvin Anshen gives support to Davies' broader view. He argues that there is an implicit social contract between business and society which represents proper goals and responsibilities of businesses. Furthermore, society makes the guidelines within which the business is permitted to operate. As examples on this case, Anshen shows that in the 19th century society wanted rapid economic growth. This supported a more narrow view on corporate social responsibility, where

profit maximization was the primary object. Today, however, society is concerned about the quality of life and preservation of the environment. So is the case for the fish industry. As already mentioned, they are met by demands of carefully sticking to defined quotas so the resources can be enjoyed by future generations as well. This demand is actually the prime principal of the Norwegian fishery and quota regulations. It states that the marine resources shall be sustainable (www.regjeringen.no #1). As argued by different scholars, and as showcased by the regulations of the fish industry, this calls for businesses broadening their social responsibilities.

Anshen is not the only one believing that the traditional profit maximization view is outdated. He has support both from other scholars and important institutions in society. In Europe, for example, the EU has decided that capitalism and business practice should be environmentally sustainable. The sustainable company should be financially successful, environmentally friendly and socially responsible. This has led to an understanding that considering environmental effects of the daily business practice is a moral norm (Beauchamp et al, 2008). The U.N. Commission of Sustainability has stressed the need for today's business firms *"to meet the needs of the present without jeopardizing the ability of future generations to meet their own"* (IBID).

Scholar support of Anshen's views, can for instance be found in Joseph DesJardins' article "Sustainability: Business's New Environmental Obligation" from 2007 (Beauchamp et al, 2008). He believes that the business of the 21st century should be founded on three pillars in order to create a sustainable society. The three pillars are economics, ecology and ethics. Amongst others, that implies a necessity to invest in natural capital. The old view of the earth's biosphere as a never ending source must be replaced by a view that it is like capital. It can generate revenue and interest, but for that to happen it must not be spent beyond the point where it is incapable of continuing to be a source of income (IBID). So is also the case for the fish resources.

The views discussed so far, all have an important thing in common. They all place most of the moral responsibility of taking care of the environment and conducting sustainable business practices on the businesses themselves. However, that leaves out a group that also have great effect on creating a sustainable society, namely the consumers. In the essay "Morality, Money and Motor Cars" (Beauchamp et al, 2008) Norman E. Bowie argues that consumers are very

much responsible for protecting the environment. If consumers want more environmentally friendly products they will demand them. According to Denis Arnold and Keith Bustos, who are very skeptical to Bowie's view, it means that businesses have an obligation to refrain from opposing the preferences of the consumers regarding environmental protection. If the consumers do not want environmentally friendly products then firms should not offer it to them (IBID). This argument can also be given a branding interpretation. It is fair to assume that branding of social responsibility issues, such as being environmentally friendly, has better chances to be successful if consumers demand it.

To quickly sum up the discussion, the businesses of the 21st century are facing a much more dynamic and demanding world than they previously did. Additionally, their power and influence on the society as a whole has increased the last century, and probably will keep on doing so in the future. As argued by R. Edward Freeman (Beauchamp et al, 2008), the instability and unpredictability that follow the new world, demands of the businesses today a broader approach to corporate social responsibility. Finally, the role of the consumer, including their demands of environmentally friendly products and socially responsible practices, should not be forgotten.

That a broader approach to corporate social responsibility is demanded of the 21st century company is also a central assumption in this project. It is believed to be necessary because the fish industry and its operations affect so many stakeholders that can not be ignored. For example, the products, and the associated health benefits of consuming fish, contribute to making a healthier society. Even though this thesis supports the broader view of CSR, it does not entirely support the view that companies emphasize CSR just because it is the right thing to do. The market challenge is a question of increasing the sales of Norwegian cod, and thereby the CSR initiatives also have a clear profit motive.

3.2.5 Corporate Social Responsibility and the Link to Financial Performance

As argued before, the corporation also has an obligation towards its shareholders. If a company is not able to make profits, they lose their fundament for existence. The fish industry is not an exception to this. Consequently, it is necessary to say something about the profit potential of being and signaling CSR, and also how to measure it.

The link between corporate social performance (CSP) and financial performance has been researched for decades (Beuden and Gössling, 2008). Corporate social responsibility is not a variable, and therefore not possible to measure. CSP is possible to transform into measurable variables, and is therefore a way to make CSR applicable and put into practice (IBID). The original debate on the issue is considered to be the one between Adolph Berle (1931) and Merrick Dodd (1932). Berle advocated that there was a possibility for shareholders to gain when a firm's strategy included investing money in CSR activities. Dodd argued for the opposite view. Since then, the topic has caught the attention of scholars across many different disciplines, including finance, accounting, management and marketing (Godfrey, Merrill and Hansen, 2009).

The research contributions from the scholars over the years have shown support to both Berle and Dodd. One of the most recent contributions, by Pieter van Beuden and Tobias Gössling (2008), shows a clear support for Berle. Their work shows that there are clear empirical evidence for a positive correlation between CSR and corporate financial performance (CFP). They reviewed previous literature on the topic and uncovered factors that influenced the relationship between CSP and CFP. The results showed that 68% of the literature supported a positive relationship between CSP and CFP, 26% showed no significant relationship, while just 6% showed a negative relationship (Beuden and Gössling, 2008). Furthermore, Beuden and Gössling argue that people stating that CSR activities are not profitable refer to outdated material. Their study excludes all material published before 1990. This is so because the businesses of today have to relate to a much more uncertain world than previous businesses. The world is much more dynamic, global and technological. Looking at it through old glasses does not show the right context anymore. CSR is a good answer to the uncertainty these factors bring about, Beuden and Gössling argue (2008).

Another implication to note from this study, is the importance of being able to identify which factors influence the relationship between CSP and CFP. If organizations are able to do that, it is argued that the chances for them to become involved in sustainability and CSR issues and activities increase. Factors that affect the relationship include, amongst others, industry, research and development (R&D), risk, adaptive capability, customer satisfaction, environmental dynamics, environmental munificence, pollution emissions, quality of management and differentiation.

As the listing of factors reveal, many of them involve and affect different stakeholders. In general Beuden and Gössling (2008) argue that if society can decide that corporations have responsibilities toward stakeholders, one can expect corporations to be held accountable for their social performance. This applies to both actions and outcomes of the actions.

Other groups of scholars are not as bombastic in their conclusions that CSR activities are positively related to CFP, as Beuden and Gössling (2008) are. In their research, Godfrey, Merrill and Hansen (2009) found that positive financial outcomes are dependent on the type of stakeholders the activities are aiming at. More specifically, they tested if CSR could work like an insurance against negative events. The major finding was that so-called institutional CSR activities – those aimed at a firm's secondary stakeholders or society at large – worked as an insurance, while technical CSR activities – those aimed at the firm's trading partners – did not yield any insurance benefits. This is so because activities aimed at the primary stakeholders should produce exchange capital, not goodwill as the case is for activities aimed at secondary stakeholders. Exchange capital means the potential to create more advantageous exchanges between the firm and the primary stakeholders. The relationship consists of exchanging power and is consistent with profit-making interests of the firm. It is self-serving, not other-regarding. Activities aimed at secondary stakeholders are other-regarding. These stakeholders lack the urgency and power to press claims on the firm.

Over the last few years a new phenomenon called the Triple Bottom-Line (TBL) has emerged. It is a way to also include social (people) and ecological (planet) performance with the traditional economic (product) performance in a company's operations and in a company's reporting framework (Dhiman, S. 2008). In general it is concerned about making company's live up to the new ideal of being sustainable. In a recent paper by Satinder Dhiman (2008) he examines the TBL efforts of some leading American companies and how they affect the aspects of the triple bottom-line.

Clorox, a manufacturer of chlorine-based products and plastic bags, quite recently started promoting Brita water filters as a sustainable alternative to plastic bottles. This new marketing effort has seen the sales grow with double digits from previously flat or declining sales. In general, this showcases the potential of using social responsibility in a branding context. Such a potential is needed to be present in order pursue a branding strategy based on CSR. Another company that can also report positive results after embracing different TBL efforts is General

Electric. In 2005 the company launched a sustainability effort called “Ecomagination”. The effort aims to build innovative solutions and products that solve today’s environmental challenges and benefit customers, society and environment. In general, the paper argues that focus on CSR and sustainability provides economic advantages and should be a long-term objective for any organization. This will be profitable due to, for example, the shared responsibility for our common future. This means that both consumers and manufacturers of goods and services have to learn “to meet the needs of the present without compromising the ability of future generations to meet their own needs”. If this is the case now, or will be so in the future, companies that present sustainable products and services, and also manage to educate the consumers so they become concerned about sustainability as well, could possibly be seeing a big profit potential.

As discussed, CSR can be a source of value for a company. It can for example be in the form of research and development, charity donations or branding, as was the case for Clorox’s Brita water filter. Branding is the way this paper aims at creating value for the company. More specifically, it will be about the ability of the company to use CSR associations in a branding context as a mean to differentiate the brand. Furthermore, since branding is targeted at consumers it will be crucial to present some findings on how they perceive CSR and what guides their thoughts.

3.2.6 CSR and Consumers

During the years, a lot of research on how consumers perceive CSR initiatives, and if it is able to affect their purchasing behavior, has been conducted. For example, Brown and Dacin (1997) have documented CSR’s economic benefits in terms of consumers’ positive product and brand evaluation, brand choice and brand documentation. To achieve such positive outcomes will also be a goal for the CSR branding efforts of Norwegian cod. Klein (2004) is proposing that consumers evaluating a firm’s CSR activities positively, also have a tendency to infer that the related product is of higher quality. Moreover, they also found indications for the opposite; that CSR initiatives evaluated negatively have a negative impact on the perceived product quality.

Positive CSR initiatives can not only lead to products being evaluated in a more positive manner. Trudel and Cotte (2008) have found a strong relationship between ethical behavior and consumers’ willingness to pay. They are willing to pay more for ethically-produced goods, as well as they will pay less for unethically-produced goods. This can also be considered to be a

goal of the Norwegian cod branding initiatives. Since the price of cod is high relative to the prices of pangasius and Alaska pollock, the consumers must be given something that adds value to the product and thereby increases their willingness to pay for it. In the study it was also revealed that there is a positive-negative asymmetry, meaning that consumers will pay substantially less for unethically-produced goods than they will pay more for ethically-produced goods. Even though CSR does affect consumers' evaluations and willingness to pay, it does not play a significant role. According to Klein and Dawar (2004), CSR is a deciding factor in consumer behavior only over and above economic and rational considerations. They state that *"while CSR plays a role, traditional constructs such as product attributes and consumption goal still account for the bulk of the variance in consumer behavior"* (Klein, 2004, p.3). This finding will be of importance for this case as well. To best showcase the potential of CSR as a purchase decision parameter for the consumers, it will be necessary to make a comparison to other purchase decision parameters.

In a research specifically studying what significance consumers place on CSR when evaluating and purchasing grocery brands and goods, it was concluded that it can be used by a brand to distinctly position itself (Aselmsson and Johansson, 2006). However, the study also found that there was a difference about what consumers want to do and what they actually do. The majority of the respondents expressed a willingness to favor ethical products, but it very seldom materialized in a corresponding behavior.

Golob, Lah and Jancic (2008) are exploring how consumers' values and personal involvement guide their expectations of companies' CSR efforts. The results are furthermore meant to showcase the potential for positioning companies as socially responsible and incorporating CSR in strategic marketing and marketing communication. Expectations are defined as *"consumers' desires or wants based on what they feel a company should do rather than what a company would do"* (Golob et al, 2008). What consumers' feel a company should do is, moreover, based on their level of involvement of certain situations and issues. That is certain CSR situations and issues like environment, sustainability, health etc. Furthermore, the level of involvement will be driven, amongst other, by personal values. Golob et al (2008) argue that ethical values are becoming more important today and have greater influence on purchasing behavior than before. Products should therefore be repositioned to be acceptable to current values.

The survey shows that consumers in general have high expectations to CSR, and therefore it should be important for companies to engage in CSR efforts (Golob et al, 2008). Moreover, consumers differ between different CSR activities in how important they perceive them to be.

3.2.7 Defining CSR as a Product Attribute

From the theory presented on CSR, it is fair to say that it can be viewed as a product attribute, since it is something that can characterize a brand or a product, and also because it is able to affect consumer behavior. This makes it possible to apply in a branding setting. Specifically concerning this case, it is a matter of finding attributes related to the cod industry that can work as branding elements. The entire value chain of the industry will be the point of departure to find these attributes. In the following that is also what we intend to do. CSR will be more thoroughly examined using Keller's customer based brand equity model as a framework.

3.3 Branding

3.3.1 An introduction

The word 'brand' comes from old Norse *brandr* and means 'to burn', which they did by marking their herd with burning iron (Percey, in Hansen 2003). This has evolved during recent decades to become an economic term defined as "*a type of product manufactured by a company under a particular name*" (www.askoxford.com). Further the American Market Association define it as "*a name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers*" (www.marketingpower.com). The reason for having a brand name is to embody information about the product or service so that it will add value and differentiate from alternatives. The brand puts a label on the product or service, but it also represents a brand attitude which includes all additional knowledge, feelings and experience a person has about the product/service. By this the brand simplifies the evaluation process for future purchases as it is reconstructed in memory cued by the brand name (Percey in Hansen & Christensen, 2003). Or as Grutzner (2002) states: "*these things (brands) represent in short a promise between you and the people who use the brand*". If this promise is kept it can lead to predictable sales, keep competitors at bay, a price premium, increased power over suppliers, customers, government and retailers, and can lead to easier recruitment of new employees (Grutzner, 2002).

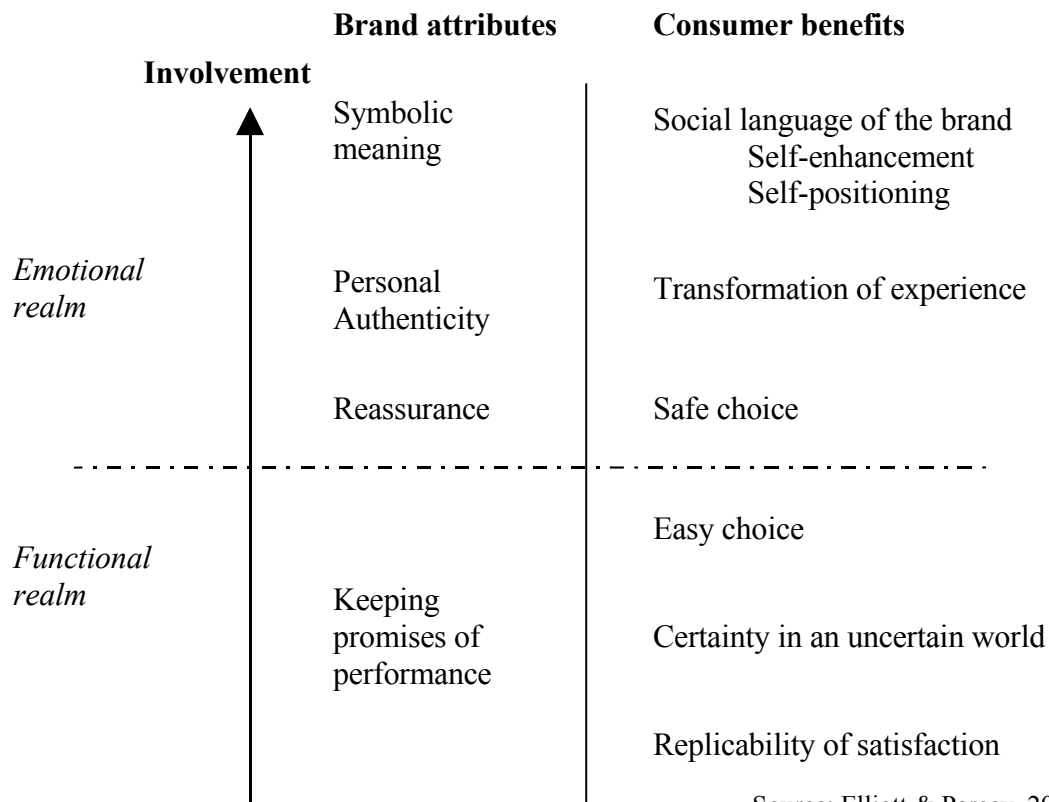
3.3.2 How does branding affect customers

To explain in some more detail how the brand has an affect on the consumer, the following will emphasize on how it can be put in a social psychological setting. This means to understand the consumer behaviour a bit better and to get a feeling of different involvement in which the product affects the buying process. These aspects can prove important to the branding of Norwegian cod in a CSR setting, as it can suggest the impact a non-tangible attribute can make. It will also make a good contribution to the discussion of how to position Norwegian cod.

3.3.3 Social psychology of Brands

When talking about brands, fig.3 models the link between the attributes the brand gets when the involvement increases which benefits the consumer experience through these attributes. There are two types of involvement, functional and emotional realm involvement (Elliott & Percey, 2007). The functional part of the brand is how the product actual perform. E.g. does the toothpaste make the teeth clean? Is the food item tasteful and eliminating hunger? When a brand has been through trial by the customer, the promises given are translated into brand attributes. A positive brand attitude will promise replicability of this positive experience and ease any future choice within the product category. This effect moves the customer involvement into an emotional situation as they get more involved with the brand. The easy choice becomes safe, and a repetitive behavior is created. The brand has now transferred itself into a psychological label of reassurance. After repetitive use of the brand, even more involvement is created and the customer comes in the position to recommend the brand and to proudly show herself as a user of the brand. At later stages she perhaps also view the brand as representing a certain feeling or maybe even as the only choice in the product category. To achieve brand attributes which result in customers perceiving it as giving benefits, the involvement must go from functional realm to emotional realm when taking purchase decisions. This is done by developing trust into the brand, and such trust can be measured in brand equity (IBID). This then means that transforming from the functional realm to emotional realm is a matter of how much trust the consumer feels toward the brand. In a world where there are so many choices, it is important to find which attributes that can comfort the customer, making them feel their choice will take care of their needs and not let them down. This includes not only the physical product, but also intangibles around the product. This is where CSR comes into the discussion, as it is additional attributes which might have an affect on the trust level between the customer and the product. Communicating this trust to the customers, can in turn move them up on the involvement scale, into the emotional realm.

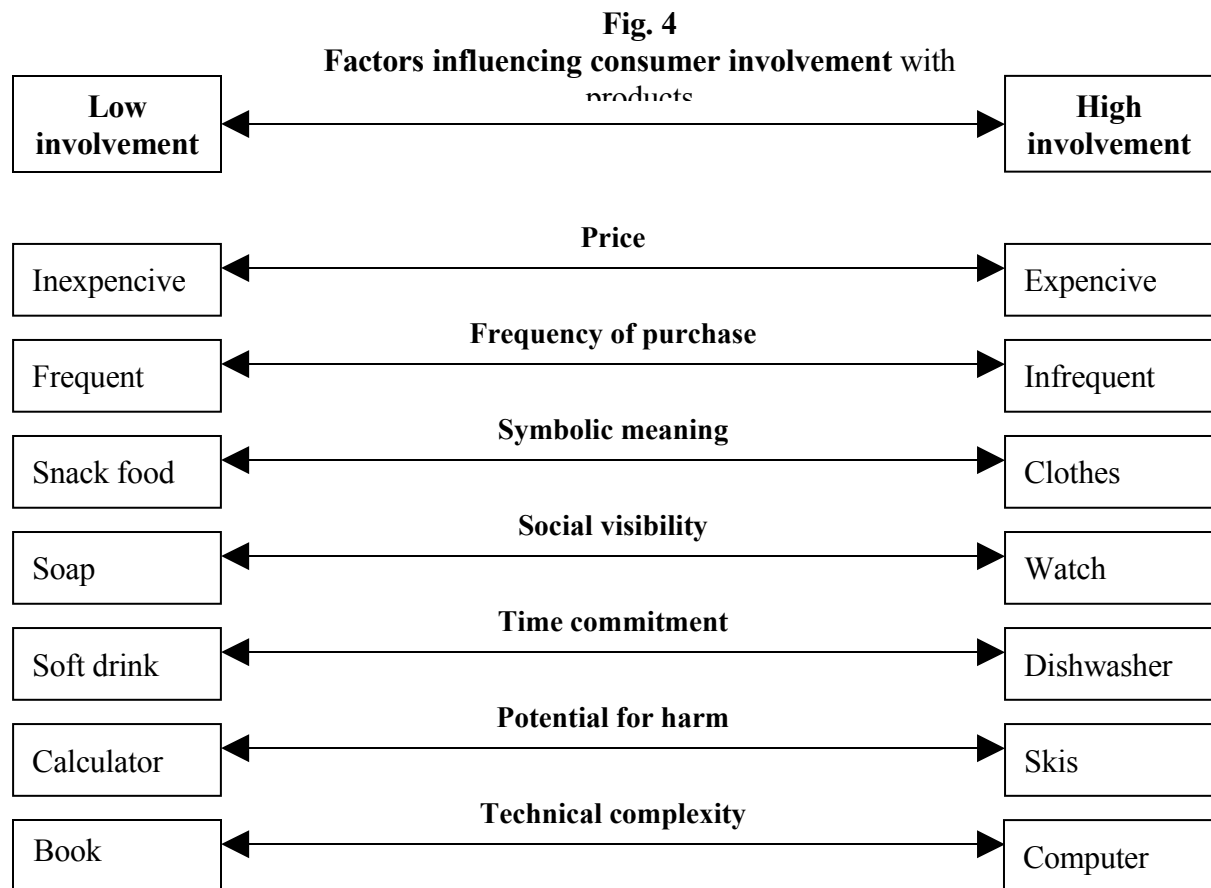
Fig. 3
The social psychology of the brand



Source: Elliott & Percey, 2007, p. 5)

3.3.4 Consumer involvement

Elliott and Percey (2007) describe consumer involvement in a product as “the relative personal relevance or importance that a product or brand has for an individual”. This gives incentives as to how much effort a consumer put into a buying process. One way to show the level of involvement a product has, is to place it on a continuum scale between “low involvement” and “high involvement” (Elliott & Percey, 2007). There are three important functions within involvement: the consumer, the product and the situation. The product does also include a set of important variables, such as shown in fig.4. What is important to recognize is that a products level of involvement is dependent on both the individual customer and situation. This means that a product can change consumer involvement not only dependent on individual variables such as need, values, self-concept etc, but also on the situation such as time available, purchase in presence of others, and intended use of the product. This means that categorizing a product must be used as an ease of application, as the consumer involvement is not identical at all times.



Source: Elliott & Percey, 2007, p. 10

When looking at product involvement, this thesis recognizes three types in connection with cod. Firstly, there is the view of cod as a low involvement product which make little difference and the customer know little about it. Elliott and Percey (2007) claim that those associations that may be there are at best weak and can easily be changed. The important thing for the consumer is to make as little mental and physical effort, and just satisfy their needs, and not necessarily get more than that. In most cases the brand awareness is the only predictor to a purchase. If it is a “top of mind” brand, it is likely that it is chosen, if not a point of purchase or a situational reason makes the consumer try a new brand. Another point to grab hold of, is that trial is the most important variable to create frequent buying. Once a product has been through trial and found satisfying, it turns into a habit and is bought as a habit.

Secondly, there are some customers which, rather than rationality, include a more emotional process. When such emotions is present toward a low involvement category, a slight positive reaction can justify less information seeking, less analytical reasoning, less attention to negative cues and less attention to realism. Apposed to an extreme emotional feeling, which is more common in high involved product categories, the customer want to feel a sense of warmth. This

warmth can be created by several factors. One such factor is to consult feelings for information, and usually does not involve rational reasoning. It leads to product preference and a posthoc rationality which can result in a habitual purchase situation (Elliott & Percey, 2007).

As a final involvement type, Elliott and Percey (2007) discuss symbolic and personal expression products. These have a high involvement, but not a thorough info seeking process. These products have a more emotion-driven process. This can be linked to when Keller (2003) talks about the new trend of creating “trustmarks” instead of just trademarks, which is intended to show how it is necessary to not only build a respected brand but put more emphasis on consumers loving the product offered.

This makes it interesting to look at the possibility for Norwegian cod to find attributes which can result in a ‘top of mind’ status, ‘sense of warmth’ and to be a trustmark. This thesis will then look into the possibility of social responsibility being an attribute which can create this.

3.3.5 Brand equity

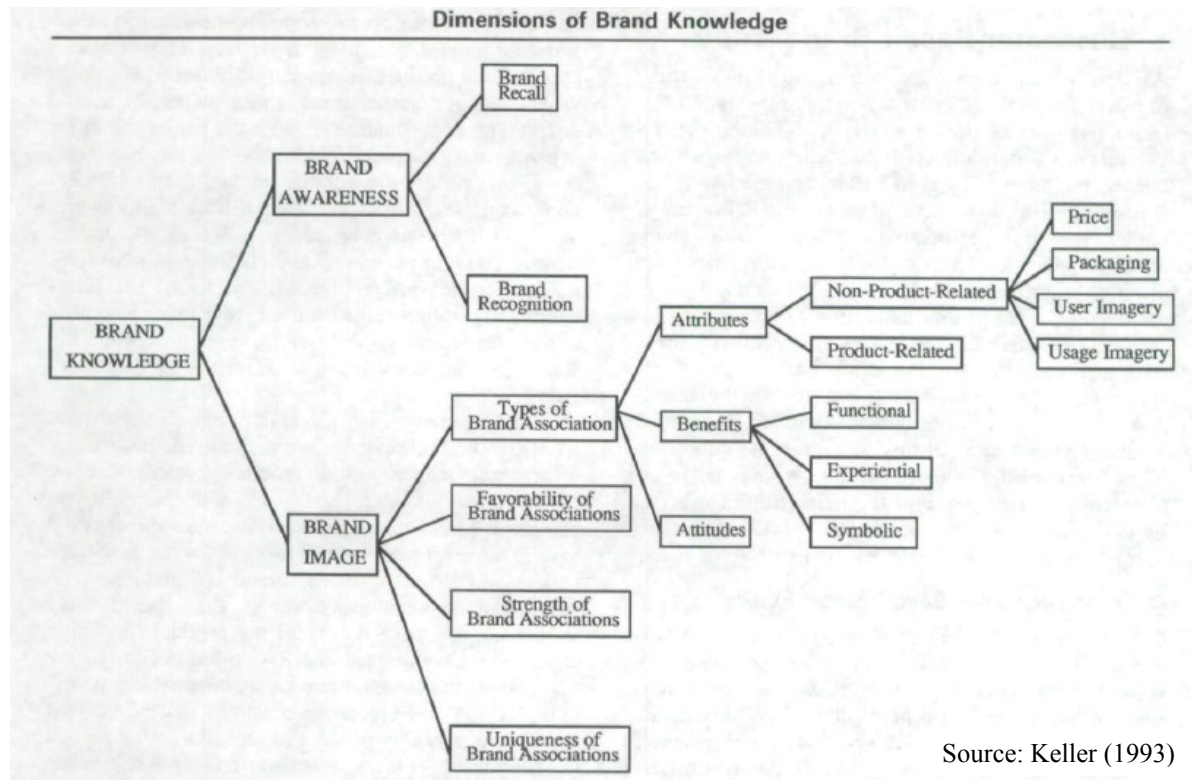
After a general presentation of branding and how it affects the customers, the following is focusing on brand equity. Keller and Lehman (2006) categorize the effects of branding in three separate areas. Firstly, there is the customer based brand equity. This can simplify the choices for them, it can promise a particular quality level, reduce risk, and create trust. The brand is the total experience the customer has with the product, thereby the product itself, the marketing activities around it and actual use. Secondly, there is the company based equity. This can give the effectiveness of marketing efforts, such as advertising and channel placement. It can also help to ensure distribution, and distinguish from and prohibit competing products to gain market share. It is also a basis for growth and expansion into other categories. Finally, there is the financial market, often being the base of estimating goodwill etc. This thesis will focus on the customer based equity.

3.3.5.1 Customer based brand equity

Keller’s “Conceptualizing, Measuring, and Managing Customer Based Brand Equity” (1993) is the origin for the following framework. In marketing the brand attitude leads to brand equity. Keller and Lehmann (2003) state: *“one of the most valuable assets for any firm is the intangible asset represented by its brands”*. The brand equity is given from customers acting more, or less, favourable toward a brand compared to an unnamed version of the same product (Keller, 1993).

A much used framework is Keller's developed dimensions for customer-based brand equity. In a consumers mind this can be showed by brand knowledge, which is divided into brand awareness and brand image. There are multiple variables which add up to the two sub-groups of brand knowledge (Fig.5). Percey (in Hansen & Christensen, 2003) includes the aspect of time in the customer based equity. This is something that adds value outside the objective characteristics the product or service has, and it is dynamic and can change over time. This is the basics of strategic brand management, as this should ensure a positive brand attitude over time. Further, when measuring brand equity it is important to look at the components which lead to brand equity. This is why it is so important to understand how a product or service equity is constructed. By continuous building and sustaining positive brand equity based on this understanding, it can over time result in an effective positioning.

Fig. 5



The customer-based brand equity is present when the consumer recognizes and has a favourable, strong and unique association to the brand (Keller, 1993). As Percey, Keller also recognizes that to build a brand is an ongoing process. A broad approach must be taken into the management of the marketing activities, recognising that all activities will affect the brand knowledge and that the brand knowledge will affect sales figures etc. This explains why brand

has become so important for all types of organisations, as it can lead to a price premium and help ensure that a product or organisation is sustainable in the market.

Keller's Customer-based Brand Equity will be the main framework for this thesis. We believe it is quite suitable in this case. First of all, the framework is very flexible. It does not only look at the brand or association isolated. It puts in a wider context, where competing brands are considered as well. What competitors do is very important in this thesis, since it is a core part of the market challenge. Moreover, the framework also provides a lot of flexibility, because it allows to be used in both more superficial ways and more deeper ways, meaning that one investigates given factors more in-depth. This research is a first-round mapping, and to make the mapping as complete as possible it is necessary to include as many aspects as possible. In order to include all the necessary aspects, the research needs a framework which allows for a relatively superficial use. The Customer-based Brand Equity model is believed to constitute that.

3.4 Linking CSR, Branding and Norwegian Cod

Above a presentation of theories within CSR and branding was made. It is now necessary to link these two more thoroughly. By going deeper into the Knowledge model, the CSR can be seen as an attribute in Keller's brand knowledge model. This will then establish how the brand framework considers the CSR aspect of Norwegian cod, and can then be taken into a brand management perspective.

This thesis mission is to investigate the potential of applying CSR elements as a way to differentiate Norwegian cod. As previously argued, building and sustaining positive brand equity can lead to an effective positioning. For that reason, customer based brand equity theory and the brand knowledge model (Fig.5) will constitute the main theoretical and research framework. Moreover, the thesis aims at identifying CSR elements that might have the potential to lead to increased brand knowledge, but it is not aiming at measuring the effects of adding such CSR elements in the current branding strategy of Norwegian cod. Consequently, the *brand image* part of the model will be in focus. In the following a presentation of how the brand image part will be applied is presented. Also a more thorough definition and explanation of the specific parts that constitute a brand image will be given.

A positive brand image is formed by linking favorable, strong and unique brand associations to a brand in memory. Keller (2003) states that “*the definition of customer-based brand equity does not distinguish between the source of brand associations and the manner in which they are formed; all that matters is the resulting favorability, strength, and uniqueness of brand associations*”. As stated, the brand equity model does not distinguish between the source of the brand associations or the way they are formed. That implies that there are many things that can be considered to be a brand association. However, certain criteria have to be fulfilled.

Types of brand associations discuss the different criteria mentioned in the previous paragraph. Here, they will be used to classify and define what kind of a meaning and CSR issues might rise in a consumer’s mind. This will be necessary to do because it establishes whether or not a given CSR issue has the potential to positively contribute to the cod’s brand equity. If it is not possible to define the CSR issues based on one or more of the brand association types, it will be of no meaning to move on to the next step and discuss favorability, uniqueness and strength of brand associations. Keller (1993) has defined three different types based on their level of abstraction. They are attributes, benefits and attitudes. As mentioned previously, a given CSR issue will constitute an intangible association. That means that when looking at *attributes*, which can be defined as “*descriptive features that characterize a product or service*” (Keller, 2003; p.71), product-related attributes can be excluded. This is so because they consider a product’s physical composition (Keller, 1993). Considering the non-product-related attributes, CSR, can in terms of the psychological aspect discussed above, possibly be linked to all four elements. *Price* is often used by consumers to position the product in the category, and similarly the *packaging* influence the consumer’s image of the product. *User imagery* and *usage imagery* is more formed by experience with the product or by the profile the product is communicated with or the social attitude toward the product. In which situations the product is usually used, is also important for the usage imagery. The *benefits* type of association is the personal value the consumers attach to the product, what the product can be and do for them. It is divided into *functional benefits* and *experiential benefits* and can not be related to CSR for the same reason as for product-related attributes. Furthermore, there is *symbolic benefits* that are more extrinsic and build social approval and subjective expression. This can prove important to social responsible attributes.

Finally, there is the *brand attitude*. This is the overall attitude toward the brand and has great impact on the consumer behavior. To uncover this Keller (1993) uses “*a multi-attribute formulation in which brand attitudes are a function of the associated attributes and benefits that are salient for the brand*”. This will first look at the salient beliefs the consumer has toward the brand (how much the brand fulfill their preferred attributes or benefits), and secondly the judgment of these beliefs. This is a key element to recognize, as it is the basis of a customer’s attitude towards the brand image, and can possibly influence the buying behavior greatly. It is important to notice that such an attitude is dependent on brand awareness. Obviously, if there is no awareness there can not be any brand attitude. This thesis will look at how the attitude is toward the existing brand, and try to uncover how new attributes can influence future brand attitudes.

In order to distinguish and discuss the potential of social responsibility issues to constitute a differential factor of Norwegian cod, favorability of brand associations, strength of brand associations, and uniqueness of brand associations must be considered (Keller, 2003).

Favorability is a question about the brand association’s ability to satisfy consumers’ needs and wants, so that they evaluate the brand in a positive manner. More specifically, it is about whether an association is desired or not, and if the product in question is able to deliver the association. Desirable can, furthermore, be split into three factors. Firstly, how *relevant* the consumer finds the association. Secondly, how *distinctive* the consumer finds the association, and thirdly, how *believable* the consumer finds the association.

Uniqueness of brand associations refers to whether the association has a competitive advantage or unique selling proposition compared to competitors. The uniqueness is, amongst other, dependent on product category and type of association.

Strength of brand associations depends on how marketing programs and other factors affect consumers’ brand experiences. The associations will vary in their connection to the brand node. Strength is a question of both the quality and quantity of information processed by a consumer. The more deeply a person thinks about product information and relates it to existing brand knowledge, the stronger the association is believed to be. Strength is, furthermore, a question of the relevant information’s personal relevance and how consistent it is presented over time.

Types of brand associations, and more specifically product- and non-product related attributes, will be used to identify potential CSR elements. However, CSR is such a wide term, and issues related to it can be found in practically every function and in every operation of a firm. Consequently, a wide approach and view of the value chain is necessary.

3.5 Brand positioning – the managerial impact

As shown in the customer brand equity model, equity is built by brand awareness and brand image. This brand image is determined by the strength, favourability and uniqueness of the brand associations. Brand positioning should in general tell the consumer what the brand is, who it is for, and what it offers. This shows the relationship between positioning and the core effects of brand attitude and brand awareness. Brand attitude is harder to measure. It is necessary to answer questions of who the target group is, what is important and to whom, and how the brand is seen to deliver the important elements (Grutzner, 2002). As shown in the problem statement, the competitive environment for cod is increasing. To strategically manage the brand into a competitive advantage, it is necessary to establish brand positioning and brand values (Keller, 2003). The CSR associations this thesis possibly uncover can therefore contribute to the positioning of Norwegian cod. Following is an explanation of important aspects in managing the positioning.

The brand positioning is about establishing key brand associates in the mindset of consumers and other important players in the value chain. To be able to do this it is necessary to identify and establish points of parity and points of difference. This will be the basis of creating the right brand identity and brand image. A critical element is the creation of the strong, favourable and unique brand associations. The customer might have a current knowledge about the brand, but positioning is to determine the desired brand knowledge structure (Keller, 2003). This is the key to the total strategic marketing. The goal is to find a distinct and valued place in a segment's customer minds. This place should be the optimal location compared to competitors and should optimize the benefit to the firm. This then should show the content of the brand, how it differs and is similar to competitors, and why it should be preferred in the marketplace. The customer-based brand equity model (Keller, 2003) suggests the following necessary elements in the positioning of a brand:

- 1) Who is the target consumer?
- 2) Who are the main competitors?
- 3) How is the brand different to the competitors?
- 4) How is the brand similar to the competitors?

Keller et. al. (2002) states the importance of establishing a frame. When positioning a brand this is the starting point and should signal to the consumer what they can expect to achieve by using a brand. This is the base of which the customer will associate points of parity and points of difference. It is important to pay attention to the frame of reference also for established brands. By doing so it is possible to meet new competing businesses which earlier did not exist.

3.5.1 1) Frame of reference

The *target market* is to define who the wanted customers are, and if there are different preferences. The market is everyone that has the interest for and possibility to buy the product. Keller (2003) suggests two basic classifications of segmentation. The customer-oriented which relates to what kind of person the customer is. Examples of such segmentation can be demographic or geographic segmentation. There is also the product-oriented which focus on how customers think of or how they use the brand or product. Examples here can be behavioural and psychographic segmentation. It can be helpful to make *criteria* of the segments. This will guide the segmentation and target market decisions. The main consideration should be profitability. Further, profitability can often be related to behavioural considerations which determine the segments after how important they are to the overall profits. Traditionally, cod has been a product-oriented commodity. This research will, by introducing CSR, move the frame of reference towards being customer-oriented.

3.5.2 2) Nature of competition

When considering strategic decisions, it is always necessary to take into consideration *competitors*. They often have close to identical target groups or might want to position themselves towards similar groups in the future. Brands can already have been introduced and have already established customer knowledge. It is also important to consider not only the closely linked competitors, but also those products which can be substitutes. This thesis will solely look at the whitefish market, and choose not to include such substitutes in the discussions. Other considerations in competitive analysis are distribution, resources, capabilities

and likely future intentions. The target and competitive frame of reference chosen is determining situation and cues which is important to the brand.

To define the competitive reference is to find the category membership. This is the products with which the brand competes. This is helpful in the communication with the consumer as they clearly can see what need they will get covered by choosing a particular brand. This is mostly important when establishing a new brand, and will therefore not be considered here. The common ways of defining category belonging is through communicating category benefits, comparing to exemplars or relying on product descriptor.

3.5.3 3) Points of difference

Keller defines *points of difference* (POD) as “attributes or benefits that consumers strongly associate with a brand, positively evaluate, and believe that they could not find to the same extent with a competitive brand.” (p. 131) It is therefore a strong, unique and favourable brand. It can be any kind of attribute, as long as it fulfils this definition in consumer’s minds. Linked to the customer-based brand equity model, these attributes can be categorized as functional, performance-related, or imagery-related considerations.

The PODs are made by customers finding it desirable and that they think the brand can deliver it. If these two elements are fulfilled it can create a strong, favourable and unique brand association.

The desirability element is consumers’ feelings for the brand as being relevant, distinctive and believable. The *relevance* is determined by how personally relevant and important the benefit is. That the consumer finds the product *distinctive* or superior, is also important. Often, an attribute is chosen based on what the brand can differentiate on from competitors, and not on what customers find attractive. To be *believable* is essential, and the brand must give a reason who it can fulfil needs.

The deliverability criteria customers have, is based upon feasibility, communicability and sustainability. *Feasibility* means to be able to perform as promised and is influenced by affordability, resources necessary, time horizon involved etc., to actually create a POD. A rule of thumb is that it is easier to tell about a fact the consumer did not know existed in the product, rather than to make changes to it and convince them of these. To have a *communicable* POD is

important to convince the consumer. It is for instance important to have a message consistent with existent brand knowledge. The consumer must be given verifiable reasons why and proof of how the brand is delivering the beneficial attribute. *Sustainability* is the ability to make the attribute last over time through internal commitment and use of resources as well as the ability to defend the POD from competition.

3.5.4 4) Point of parity

Keller (2003) defines *points of parity* (POP) as those associations which are not necessarily unique to the brand. The two forms of POP are the category and the competitive associations. The category POP is the associations that consumers look upon as being necessary to be a credible option in the category. It is what is needed to get into consideration, and looked upon as covering the most basic needs in the customer mind. The POP usually changes over time based on technical advances, legal development and consumer trends. An important issue in competitive POP associations is when one competitor has a strong associative position and uses this as point of difference, but simultaneously another brand hold the same associative position. If this other brand then establishes another strong association, it will gain a superior position.

The POP does not have to be exactly equal as competitors, as consumers have a zone of tolerance where they can accept the level of the attribute as sufficient not to be a factor in their evaluation. To achieve POP is considerable easier to achieve than POD, as POD must differ substantially from the competition. The category's POPs are driven by category creation of POP and attempts of turning competitors POD into POP.

3.5.4.1 Establishing the POP and POD

Some key elements are important to recognize when establishing POP and POD. For example, being low priced and have the highest quality is hard to combine, and represent both a positive and negative correlation. This is because the correlation between low price and low quality usually is a well established element in the customers mindset. Competitors also often try to create POD on attributes which are negative on the target brand. It is therefore often best to position the performance on both the positive and negative dimensions. To be able to do so, Keller (2003) suggest three approaches.

By *separating the attributes* one can use these in communication to show more than one positive attribute. It is an expensive approach, but effective. Further it is possible to *leverage*

equity of another entity. This is done through endorsement such as spokespersons, linking to other brands etc. and is borrowing equity from these. Another way is to *redefine the relationship*, which is to explain and convince that it actually is a positive relation. This is done through suggesting a new way of thinking about the relationship, and by involving other factors it can prove acceptable. The challenge is to create a credible story.

3.5.5 Positioning over time

Over time, it is important to consider the changes in the market and to see how competitors are positioning themselves. By updating the positioning, it involves two important issues. One is to deepen the meaning of the brand to evolve core values, also called laddering. The second is to respond to competitive positioning. This thesis is doing exactly that, trying to uncover new ways to position the Norwegian cod in a dynamic market.

Laddering is to make sure that customer acceptance of an attribute, and how this relates to competing brands in the market, is positioned even stronger in people's minds over time. Another way of discovering needs, is through means-end chain analysis, which uncovers how attributes lead to benefits and consequences that satisfy values (Keller, 2003). A constant mapping of changes in customer attitude towards the brand is needed to exploit the opportunity of increasing brand equity. This analysis will show when they are ready to climb the ladder from attributes to benefits to more abstract values/motivations.

Reacting to competitors actions is an important strategic decision. This is when competitors create a POD or turn your POD into a POP. There are three reaction alternatives to this. The first is to do nothing. This is the right reaction if it is unlikely that they will succeed in the creation of a POD or to recapture a POD. If there is a chance competition can disrupt the market, a defensive reaction can be taken. This can be done by reassuring the market of your brands position in POD and POP. Finally, if competition takes damaging actions an offensive reaction should be taken. This is an aggressive move, and should reposition the brand to address the threat (Keller, 2003).

3.6 Criticism of the brand equity model

Keller's Customer Brand Equity theory is often used to measure the brand equity. There are developed numerous research methods involving measurement with Likert scales etc. By this, the model can give a measurement of the brand equity and it is possible to track any positive or negative changes. This means that the model is usually used in positivistic research. However, when Keller builds up his model, he does it in such a manner that gives the opportunity for using it as basis for more than just positivistic methodologies. By that it seems fit to use this framework in this research. The results of the research might prove to be helpful in positivistic research later on, if the attributes found can be put into the brand equity equation.

4 The process

As this thesis was a first-round mapping of CSR's potential as an element in the branding strategy of Norwegian cod, it was necessary with an open mind and a broad view from the very first moment. More specifically, this meant that the findings continuously needed to be evaluated in order to decide whether alternative and more useful directions could and should be taken. The case of the consumers is an example of the research taking an alternative direction. Initially, the idea was to investigate them more closely after the experts had been consulted. But the findings from the expert interviews, combined with other sources of information, concluded that the demand for CSR was not sufficient enough to be used as a branding element. Due to this, it was decided not to approach the consumers further. This was additionally backed by the findings indicating a huge gap between the attitudes and behaviors of consumers. Instead, it was decided to investigate the future potential of CSR as a branding element, since all the interviewees depicted a positive future.

Another example of the research taking new ways while being conducted was the decision to approach NGOs, and more specifically WWF. The expert interviews revealed that they had a lot of power in terms of influence on consumers. Therefore a talk with them was considered valuable because they could provide additional thoughts on the topic of CSR as a branding element.

5 Discussions

In the following chapter the research question, including sub-questions, will be discussed. The discussion will be based on the theory presented and primary and secondary sources of data. The structure of the discussion chapter will be as follows: Firstly, each sub-question will be discussed one at a time. Thereafter, the conclusions and major findings from the sub-questions will be put together and provide an answer to the research question. The overall framework for the discussion will be the customer-based brand equity model.

5.1 Sub-question 1: Among suppliers of whitefish, is CSR used as a branding element?

How is the Danish whitefish market working presently in terms of branding CSR elements? To answer this, a general analysis of Cod, Alaska Pollock and Pangasius has been made, followed by a literature review on the area. Experts were also consulted to have their input on the market situation. Additionally, observations of available products and its providers were made in-store and on the internet. The following discussion combines these sources and attempts to find existing elements in the market that exploit CSR in the communication of whitefish. The findings will be linked to the presented theory of branding and CSR. This will discuss any established uniqueness in the market. This then aims to find if there are products positioned with CSR-related point of differences, and if there are established any point-of-parity necessary to consider when operating in this market, as discussed in the theory chapter.

5.1.1 Physical attributes

The analysis of the three species uncover that there are many similarities in physical attributes. They can all be used in similar situations and be prepared similar ways. Cod, Alaska Pollock and Pangasius have origin from Norway, USA (Alaska) and Vietnam, respectfully. Norwegian Cod is twice as expensive as the two others (Appendix 13). Keller (1993) puts a link between the non-product related attribute price and product quality. If a product has a higher price it is assumed to have higher quality. In combination with NSEC's generic marketing of Norwegian fish, focusing on quality can lead to quality being a point-of-difference for the Norwegian cod. Even though there possibly is a difference in experienced quality level, overall the products are comparable in their physical attributes and cover the same basic needs. It is therefore clear that they are included in the same product category and can be compared on the customer brand equity attributes uniqueness, favorability and strength.

5.1.2 CSR Logos and Labels.

There are several findings of brand elements in relation to CSR. As Keller (1993) states, a non-product related attribute such as packaging, is very important for low-involvement products. This kind of in-store branding towards the consumer is showing differences between the products. There are examples of that all three products are used in relation with the Danish ‘Twice a week’ and the ‘Key whole’ brand (Appendix 13). These brands are made to get a general sales increase for fish through reminding the customers of its health benefits. These brands are open for all to use and can function as point of parity.

Sustainability is a CSR element used frequently when branding Alaska Pollock products. As it is MSC certificated, Alaska Pollock has been embraced by grocery stores and restaurants globally, such as McDonalds (www.intrafish.com #1). In-store observations showed that Alaska Pollock was using the MSC logo 75 % of the time (Appendix 13).

Using the MSC approval as a branding element is not the case for Cod. For the time being this fish specie has not been certified by the agency; however an approval is pending and possibly granted during 2009. For now, some Cod products use the waters of origin where the cod is caught, for example using a “From the Barents Sea” label. This is used because NGOs recognize Cod caught in these waters as sustainable (e.g. www.hvaforenfisk.dk), and the regional media has covered this positive story. Cod caught in the Barents Sea can also mean that the product has traveled a short distance when reaching Denmark, resulting in a lower carbon footprint than its two competitors. Additionally, Norwegian farmed Cod has in some occasions been branded by Findus as “Sustainably Farmed Cod” (www.intrafish.com #2). Even though the Cod stock is not MSC certified, one individual producer has been certified. This is based on their use of sustainable catching methods, using longlines (www.intrafish.com #3). When the Norwegian North-East Atlantic cod will become certified sometime during 2009, this producer can immediately start using the MSC brand, as their whole value chain then is certified. In addition, and as mentioned in the introduction, Norwegian Cod is part of a generic market strategy. This strategy has included a CSR element of being sustainable. The “Seafood from Norway” brand is, however, not present on any of the products observed in the grocery stores (Appendix 13).

Pangasius is not MSC approved either, but there are examples of claiming the fish to be sustainably bred as they use much fruit and rice in their feed. This is an important element as media have been critical of wild caught fish used as feed in aquaculture. The quantity of wild caught fish used as feed often exceeds the quantity of produced farmed cod. This is critical as there is a social focus on exploiting our natural food resources more efficiently in an increasing global food demand.

There is one brand on the Danish whitefish market focusing on CSR. This is Pangasius from Butler's Choice (Appendix 13). This brand tells the consumer "*We Care to be Fair*" and the product "*respect the environment and people*" (IBID). They also claim their Pangasius to "*be rich on Omega-3*", a claim said to be misleading as Pangasius hardly contain any omega-3 (www.intrafish.com #4). Despite this, Butler's Choice uses CSR to build their brand, and is the only observed brand extensively using it on the Danish whitefish market.

5.1.3 Web pages

The web pages of the products and its providers, are all mentioning CSR, but in most cases it has a moderate focus. Most of them quietly state that CSR is a value which is important for their overall operations, not drawing much attention to it (Appendix 13). Again, Butler's Choice is using CSR as a core value. The whole site is dedicated to it, including background music containing lyrics praising the environment, such as "*Oh, Mother Nature...()...won't you let your rivers flow...()...this is everything I need*". They promote their Pangasius as 'omega-3 rich'. The specie is rated as yellow in the 'WWF traffic light' campaign for sustainable seafood and contain close to no omega-3. In the long run, a CSR focus from Butler's Choice, when they promote non-socially responsible products, can prove dangerous. It is also interesting to see this in connection with Aker Seafoods' wish for a fair competitive market in this area. They wish the Pangasius welcome, but demand that they act fair and square in their market approach (Appendix 12). Butler's Choice's claim of Pangasius being omega-3 rich is an example of unfair competition, as they use questionable marketing efforts.

An example of a possible brand element which can be used, is WWF's 'traffic light' campaign, categorizing North-East Atlantic Cod and Alaska Pollock as green, while Pangasius is labeled as yellow. Yellow means it is recommended to control the Pangasius for environmental influence before purchase (www.hvaforenfisk.dk). This can be a point of difference for Cod and

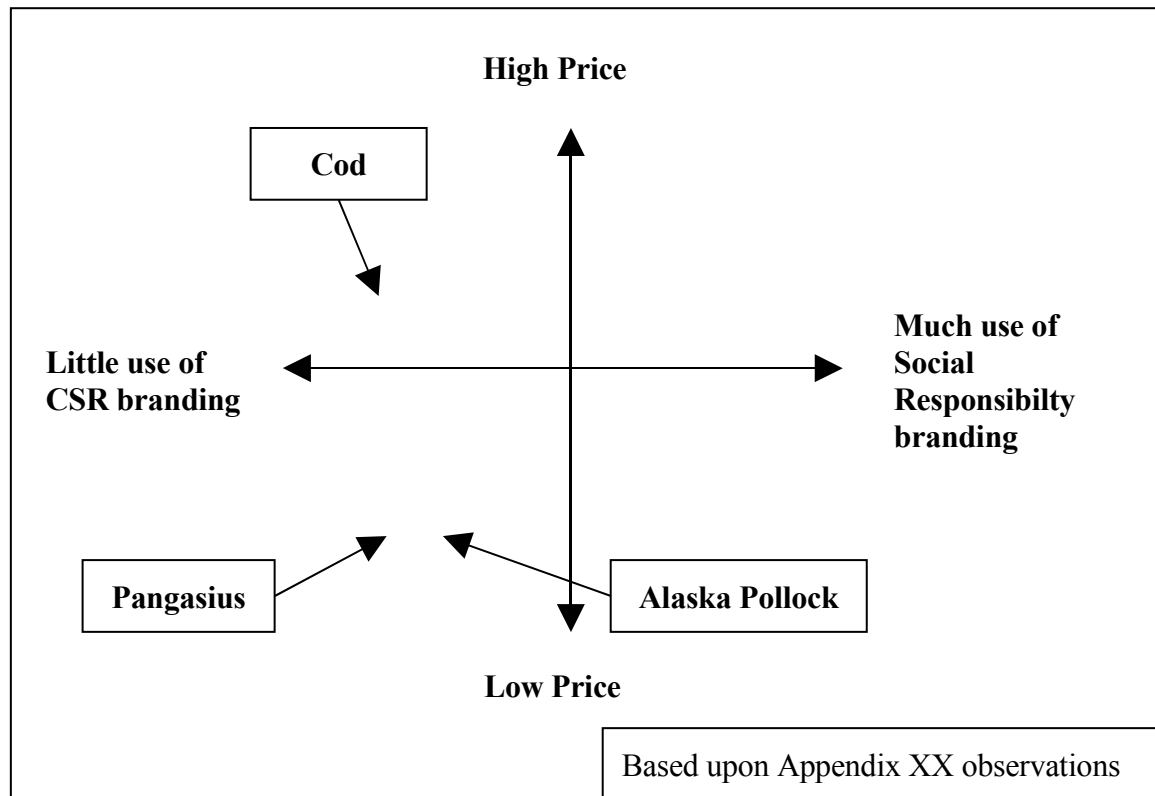
Alaska Pollock, an important element in a market increasingly influenced by Pangasius. This element is not used by any of the producers, neither on the packaging nor on their web pages.

5.1.4 Summed up

In general, the Danish whitefish market is not overwhelmed with the use of CSR as a branding element. Two CSR issues used as branding elements are sustainability and health, such as Alaska Pollock use of the MSC label, ‘omega-3 rich’ Pangasius or ‘Cod from The Barents Sea’, but most products have no branding of that kind at all (Appendix 13). The health element is basically a claim of containing omega-3, a claim which is questionable for whitefish, as the omega-3 level is minimal compared to other species such as salmon (<http://www.seafood.no> #9). The sustainability element is used by some through the MSC brand (Appendix 13). This seems as an important brand as it is recognized by purchasers and the industry as a whole. As purchasers demand the catch to be MSC certified, it has presently a clear potential of working as a point of difference. This point of difference is however only possible toward the purchasers, as consumers are for the time being not educated in its content, meaning they are not presented in an active way for the background and meaning of the MSC label (Appendix 10). As customers’ attitude is a dynamic force, it is quite possible that the demand for MSC increases in the future. Consequently, it is likely that the MSC brand also will be a point of parity in the industry, as it is something that all products must hold to even be recognized. This is predicted by whitefish producer Ocean Trawlers who claims that, due to a growing demand from consumers and retailers, MSC certification will become a must (www.intrafish.com #5) .

Presently MSC is used by some Alaska Pollock producers. In connection with the price advantage this competitor has over Cod, it thereby has two important competitive advantages. A good example of the power the MSC brand has, is the change of content in some products from Cod to Alaska Pollock, as a demand from purchasers of Aker Seafoods products (Appendix 12). As a point of parity, the WWF ‘traffic light’ system recognizes the three species as being almost equal. It is, however, an advantage for both Cod and Alaska Pollock that the Pangasius is not yet reckoned as totally safe. By this, Cod has uniqueness and competitive advantages relative to Pangasius. However, it seems that this advantage is not exploited in any way. The sustainability and health elements can both easily be copied, and will in the long run probably not work as a point of difference. The third element mentioned above, the Carbon Footprint, can however prove as a unique point of difference.

The positioning grid in fig.6 indicate roughly the present position the three competitors have in the Danish whitefish market, relative to each other. It is based on the most important attribute in the customer's mindset on one axis, namely price. Opposite axis represent how much the attribute under investigation, CSR, is actively used in the market by the same competing products (fig.6):



The three products are, as seen, closely positioned when it comes to the use of CSR, but cod differs drastically in price.

5.2 Sub-question 2: Can CSR affect the consumer's point of purchase decisions?

According to Keller's customer based brand equity model, the question of whether CSR can affect the consumer point of purchase decisions, can be translated into a matter of considering how favored it is as a brand association. In connection with this matter, we suggest an assumption that if a brand association is favored, it will affect the consumers in such way that they will buy the product in a given point of purchase situation. Additionally, favorability is a question of CSR's ability to satisfy needs and wants within the consumer, and if it is considered to be desired or not. In this discussion, CSR as a brand association, will mostly be treated on a general level, meaning that we will not differentiate the many different CSR issues that exist. However, some exception will be done where it comes natural.

When considering if CSR is desired or not, it will also be crucial to make a distinction between consumers' attitudes and how they actually behave. This will be important for this case, because the market challenge can only be coped with if CSR as a branding element contributes to create an extra value for Norwegian cod and increase the sale of it. In the following consumers' attitudes regarding CSR will be presented and discussed. After that, findings about their actual behavior will be presented and discussed.

5.2.1 Attitudes.

That consumers desire CSR and have a need for it, finds support among many different actors. The actors include people such as researchers, scientists, purchasers, the consumers themselves and various other actors within the fish value chain. On a general and global basis, Børge Damsgård, principle scientist at the Norwegian Institute of Fisheries and Aquaculture, states that they are noticing an international trend where consumers demand ethics in the methods of fish farming and slaughtering. Manufacturers who are not able to meet these demands will suffer economically (www.intrafish.com #6).

The statement indicates that consumers' purchasing behavior is affected by whether a product has taken CSR considerations or not. However, affected can actually mean two things. One can look at it as way for consumers to reward CSR, or ethically produced goods. Or one can look at it as a way for consumers to punish unethical products. This distinction is important to consider, because there has been found that there is a positive – negative asymmetry in consumers'

willingness to pay for ethically-produced goods (Trudel and Cotte, 2008). The statement made by Damsgård indicates that not following the ethical consumer demands will punish the manufacturers. Consequently, consumers might be more receptive of negative events than positive events. Branding of CSR must, in this context, be viewed as a positive event, and thereby have less effect on the consumers than what is the case for negative events. Such a view is also supported by Morten Jensen, Executive Vice President Sales and Marketing at Aker Seafoods (Appendix 12). He states that the media are very interested in the non-governmental organizations work, such as the World Wildlife Foundation, and print a lot of their stories. However, there is an overload of negative stories relative to positive stories. This is so because they sell better than positive ones. Also here, there is an indication of a positive – negative asymmetry, which eventually might influence behavior.

In an AC Nielsen survey (Appendix 14) executed in 2008 and 2009 a positive attitude towards CSR among Danish fish consumers is revealed. Especially, the following data are interesting:

1. 66% strongly agree or agree with the statement that they prefer to eat fish that is ethically sourced and kinder to the environment
2. 55% strongly agree with the statement that they prefer fish products that are sustainably sourced
3. 53% of the respondents strongly agree or agree with the statement that they are concerned about overuse of the global fish stocks
4. 55% believe it is important or very important for their purchase decisions that product labels declare that the fish is sustainably sourced
5. 23% actively try to buy products in recyclable packaging, 62% actively try to buy organic products, 22% actively try to buy ethically produced or grown products and 27% actively try to buy products that have not traveled long distances to get to the stores

Point one is a relatively clear indication that consumers have a demand for CSR. About 2/3 of the respondents would like to buy products that have taken an ethical responsibility.

Point number two and three reveal that the consumers are concerned about sustainability. That such a concern is present, is important because sustainability is probably the most important CSR issue related to fish. At least it is one of the issues most often mentioned and discussed,

which can be exemplified through the MSC label and through WWF's green – yellow – red light campaign (www.msc.org and www.hvaforenfisk.dk).

Moreover, it is also interesting to see that there is not only a more overall attitude and need of CSR among the consumers. Point number four is approaching the purchase decision directly, and according to the answers, consumers think of CSR matters when they buy fish. It therefore indicates that CSR-related thoughts are activated at the time and place when a decision is made. Additionally, it also indicates that consumers are willing to actively do an effort to obtain the information needed since they will check the packaging to see if the fish is sustainably sourced or not.

That the consumers think of issues of CSR when they are in the stores, is furthermore backed up by the fact that they actively try to buy products that consider different CSR issues.

In a qualitative study from 2006 emphasizing Danes' attitudes towards fish (www.miljoeogsundhed.dk), more support for the argument that CSR can affect the consumers' point of purchase decisions is found. The following two findings suggest that:

1. A positive attitude towards ecological fish is revealed
2. Some consumers would refuse to buy fish that is caught without considering the welfare of the fish and the environment

Considering the two findings above, it is not only worth mentioning the general support for CSR showcased. This is as well a case of the impact negative CSR behavior can have on consumers. As mentioned previously, it can lead to the willingness to pay being considerably lowered (Trudel and Cotte, 2008). Furthermore, it can also lead to the consumers evaluating the quality of the brand and the related product more negatively. The opposite effect will take place if there is a positive CSR action being executed (Klein, 2004). A higher willingness to pay and an improved evaluation of the brand and product, will be of utmost importance for Norwegian cod if it wants to succeed in the competition against the low-priced substitutes. More specifically, a higher willingness to pay means that the consumers will accept a higher price for the fish. Such an acceptance is very important to achieve because price is one of the most important decision factors when consumers buy fish. Price will be explored more thoroughly in the next sub-question. If CSR leads the consumers to accept higher prices for cod, the

advantages Pangasius and Alaska Pollock have in terms of price might get eroded. The quality is, in the case of fish, often associated with the physical product, and also an important purchase decision factor. This implies a potential of CSR to contribute to an extra dimension of quality to the fish, which might strengthen its position relative to Alaska Pollock and Pangasius.

From a survey dated back to 2001 (www.ethiclaw.dk), one can also find that consumers have positive attitudes towards socially responsible food and ethical consumer behavior. Close to 70% of Nordic consumers think it is important to demonstrate their attitudes as consumers, for example by boycotting products. Almost 3/4 of the consumers claim that they are ready to pay more for food produced with respect for animal welfare and the environment. Finally, nearly half of the consumers claim to prefer organic food, even though it is often a bit more costly.

Based on the numbers it is fair to say that there is a demand for ethical products, and that the consumers find it desired. Especially for this case, it is interesting to see that nearly 75% of the consumers are ready to pay more for foodstuff produced with concern for animal welfare and the environment. This shows that, attitude-wise, consumers are receptive of messages portraying positive CSR concerns. Additionally, it also shows that the consumers are ready to act according to their attitudes.

If only the attitudes of the consumers are considered, there is no data found that specifically show a negative attitude towards socially responsible food, and thereby makes it unwanted. However, there are data available that showcase the picture of favorability in a slightly different way. Several sources claim that CSR is not a thing that should regard the end-consumers. In a Nordic seminar about ethics information on food products, it is claimed that the consumers expect others, for example the grocery chains, to already have considered ethical aspects, and that the goods offered in the stores already live up to a reasonable ethical standard (www.norden.org). The same attitude is also found in a report emphasizing Danish consumers' view on the relationship between ethics and consumption (www.ethiclaw.dk). The respondents contributing to this report have expectations that the stores shall take ethical responsibility for the goods. Additionally, they also believe it is the responsibility of the stores to approve producers. A similar attitude is also revealed in the 2008 – 2009 AC Nielsen survey about Danish fish consumption. Here, only 9% of the respondents believe that people who buy or eat fish are responsible for ensuring that the sea's stocks are not overused. (Appendix 14).

As mentioned, these findings does not say anything about the attitude towards CSR in itself. However, they are still important to consider because they do contribute to affect the consumer when he or she is faced with a purchase decision. If it is so that the consumer does not find it to be his or her responsibility to evaluate a product's ethical standards, it can be argued that the chances for him or her to be affected by CSR branding efforts are relatively small. On the other hand, Nicole Linde Jensen (Coop Nordic) (Appendix 9) states that she believes that consumers want to take responsibility for checking if a product satisfies CSR standards or not. The reason for her belief is that society is individualistic, and it should be up to every single one of us to make such evaluations.

Concerning attitudes, it is fair to conclude that CSR in itself is considered to be a good thing. Consequently, it is fair to assume that, based on attitudes towards CSR only, it can affect the consumers in a point of purchase decision. However, there are other attitudes that might contribute to the opposite. The attitudes found here are not directly connected to CSR itself, but more to attitudes towards who are responsible for products being ethical.

Even though there is a general positive attitude towards CSR, it is crucial in this case to also look at actual behavior. This is so because the market challenge can not be coped with if only the attitudes are positive. They need to result in positive behavior as well. Positive behavior in this context means that the consumers buy more Norwegian cod because they find the CSR branding efforts favored. It is therefore important and necessary to also consider data that tell something about the consumers' actual behavior when facing the choice of buying socially responsible products.

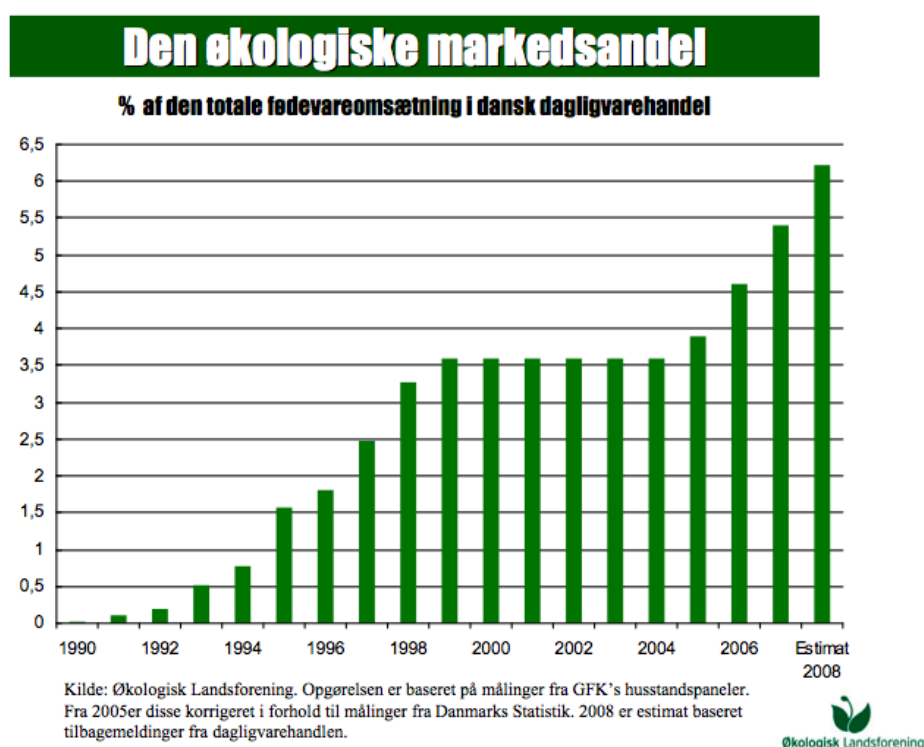
5.2.2 Actual behavior.

Data about actual behavior indicate that consumers in a very low degree follow up their positive attitudes towards CSR. The following table (Table 4) is an example of that (www.ethiclaw.dk) (translated from Danish to English):

Statement	Attitude	Behavior
I think it is important as a consumer to show my attitudes – for example by boycotting products	70% agree	The sale of Fair Trade goods in Denmark constitute between 1 and 2% of total sales
I would like to pay more for foodstuff that consider the well-being of animals and the environment	Nearly 75% agree	The total sale of ecological products is 5,6% in Denmark
I prefer to buy ecological products even though they are often slightly more expensive	48% agree	The sale of ecological milk is 1/3 of the total market

As one can read from the table there is a huge gap between people's attitudes and their behavior, represented by market shares of total Danish food consumption. This table is perhaps not completely up-to-date since it is a 2001 survey. Unfortunately, more recent data has proved hard to obtain. However, some up-to-date data that correspond quite well with point two in the table were found. These data shows that there is still quite a big gap between consumers' attitudes and behavior. In the AC Nielsen survey from 2008 – 2009, 62% of the respondents stated that they actively try to buy organic products (Appendix 14). The actual behavior, represented by organic / ecological foods' market share of the total Danish foodstuff market, shows that it is at about 6,2% in 2008 (Fig.7). The gap between attitudes and behavior is thus still quite high.

Fig.7 : The organic / ecological market share:



Source: <http://fremtidenslandbrug.dk/?p=35>

This gap is also emphasized by the purchasers. Nicole Linde Jensen states that Coop experience a mismatch between the sayings and doings of consumers. They give an impression of wanting to prefer socially responsible products, but they do not follow through in real life. She also says that sustainability is more important than price and quality for only a small segment. To even more underline the little emphasis CSR has on consumers' actual buying behavior, this is a factor not mentioned at all by Nicole Linde Jensen when she is asked to describe the purchasing process of a consumer (Appendix 9). Jesper Lehmann also believes that CSR is not demanded by consumers today, except a small segment. The segment, however, is too small to fill a sufficient demand for him to create a portfolio of socially responsible fish. Concerning the gap between attitudes and behavior, Jesper Lehmann believes that many consumers do not act according to what they say and think. Additionally, he comments that the task of making consumers today seriously consider aspects of CSR when buying fish, is an impossible battle to win (Appendix 10).

As both Nicole Linde Jensen and Jesper Lehmann state, there is only a marginal segment demanding socially responsible fish. The consumer behavior in their respective stores have shown that the segment is so small that it is not worth putting any emphasis on it. The argument

is even more intensified when considering the statement of Jens Lehmann where he believes that getting consumers to seriously consider CSR when buying fish, is an impossible battle to win. Not only is it an indication of the consumers not considering CSR. As well, it might indicate that consumers are not very receptive of information containing CSR. Such information could for example be branding.

As the discussion of the attitudes concluded, CSR can affect the consumers in a point of purchase decision. The findings and discussion of actual behavior, tells a somewhat different story. Previous research and interviews with the purchasers indicate that CSR can affect only a marginal segment.

5.3 Sub-question 3: For consumers, how important is CSR as a purchasing argument compared to other purchasing arguments?

Making the comparison between CSR as a purchasing argument and other purchasing arguments, will give additional contribution to the discussion of favorability. From the previous sub-question it was concluded that consumers had positive attitudes towards CSR, but that the corresponding behavior was somewhat doubtful. The attitudes, which can be considered to be buying arguments in a purchase situation, were only looked at in isolation. However, when consumers buy fish there are other, more traditional and rational, buying arguments playing a role as well, and consequently affecting CSR as a buying argument. To evaluate CSR purchasing arguments against other, more traditional purchasing arguments, is necessary in order to make additional contributions to the discussion of favorability, and consequently CSR's potential as a branding element.

There are many elements playing an important role at the point of purchase of fish. The Danish buying behaviour of fish takes into consideration the availability, habits, taste, preparation methods, family/partner preferences etc. (www.miljoeogsundhed.dk). In addition the price and quality is important in the decision process. The consumers have a preference for fresh fish, preferably bought at a fish monger. However, due to lower availability of fresh fish, the common distribution channel is through the frozen section in the grocery stores. The CSR

attributes which are mentioned most frequently are sustainability and health (Appendix 7 ; Appendix 9 ; Appendix 10).

As seen, there are several elements important at the point of purchase. But there are one element mentioned by all sources as the most important attribute; price. The retailer group has, based on revenue information, estimated that 2% of consumers make purchases based on ethical considerations, 15% sometimes pay more for ethically profiled products, and 80% solely focus on price when making their decision (www.norden.org). The Danish consumers are price conscious and very fond of special offers, commonly communicated through direct-mail (Appendix 9). It is made clear that when the market is in intensive price competition, it is even less chance of CSR issues to be part of the decision process (www.norden.org). This makes a focus on CSR from NSEC less necessary as it can create little point of difference to the customer majority in market reality. This is also the attitude of the retailers. They do not want to complicate the work around CSR at the decision point as consumers do not get influenced by such, and thereby want the use of CSR to have status quo. *“CSR can be a buying argument only if everything else is equal. In the fish market price and quality are such dominating variables that expecting equality to them is not likely”*, Lone Marie Eriksen from Fiskebranchen expressed (Appendix 7). In real life, CSR is thereby not likely to contribute to the sales figures. This is confirming what Klein and Dawar (2004) says about CSR being a deciding factor in consumers behaviour only over and above economic and rational considerations.

The interviews reveal that in addition to price, the most important attributes today are quality and freshness. This can make a good case for Norwegian Cod, as it has the ability to deliver freshness because it is caught close to the Danish market, and since cod historically is seen as a good product on the Danish market. Others are sure that sustainability and health are important attributes, but that it must be taken into the equation with price (Appendix 8).

In general, purchases are done on impulse. As much as 70% of the choices made are done after entering the store, and the decisions are made in less than one minute (Appendix 12). According to Jensen (IBID), this gives an enormous importance to proper facing and placement of the products in-store. This in-store influence must, according to Jensen, be backed up with point-of-sale campaigns and labelling of the products (IBID). These product intangibles can be exploited by a brand strategy through the mentioned brand attribute ‘packaging’ (Keller, 1993). Linking these data to the theoretical discussion about involvement shows that these products lean toward

low customer involvement (Elliott and Percey, 2007). They are relative low priced, however not among the cheapest food alternatives. The frequency is somewhat high, though not as frequent as milk etc. For most, the symbolic meaning is low. This is one place where CSR attributes can play a role in the involvement. The social visibility is usually low as well, except when used in dinner setting etc. The time commitment is, as mentioned above low, as is the potential for harm and technical complexity. As the products create low involvement, a branding strategy can, according to Keller (1993), prove very important when positioning a given product. What is important, is to have an overview of the involvement the different factors have in the customers' minds, and to position according to this if suitable.

The discussion shows that the most important attribute for whitefish is price, followed by quality. When looking at the quality attribute, it can be argued that this is a category including many other attributes, as supported by fishmonger Jesper Lehmann (Appendix 10). The most important quality attribute seems to be freshness. It is at the same time seen that the consumer does not actively act upon their need for freshness, and if it is not available it can easily be changed for frozen fish. Availability can therefore be seen as more important than freshness. Together with taste preferences and preparation convenience, these attributes are those most commonly considered by consumers. There are some smaller segments considering CSR when purchasing fish. But for most, CSR fall down on the needed attribute list. CSR associations might be positive and relevant, but that there are no such attributes which can make the products more desirable and favourable. This is because it is presently not seen as distinct and believable attributes to create a purchase releasing feeling. Being a product lacking this distinction and believability, puts the attribute into the discussed low involvement category (Elliott and Percey, 2007). It can therefore be concluded that CSR attributes presently have much lower impact in the customers' mindset at point-of-purchase, compared to price, quality and availability.

5.4 Sub-question 4: How do Danes perceive Norwegian cod

This question can be translated into a matter of discussing the existing brand awareness, strength and knowledge of Norwegian cod. Furthermore, it will also be relevant to consider the information about Norwegian cod the Danish consumers are provided with. Both quantitative and qualitative aspects will be discussed. Finally, this sub-question will also look for possible links to the existing branding strategy of Norwegian cod.

In the discussion of this sub-question, it has to be made clear that associations are defined differently than in the previous sub-questions. Here, associations mean Norwegian cod in general and all associations connected to it. It was necessary to make this adjustment, and to make the approach wide, in order to uncover as many thoughts and images of Norwegian cod as possible. That makes it more easy to see a link to CSR associations, and if there are any links to the existing branding strategy.

The secondary sources investigated were not able to provide any help in the discussion of Norwegian cod's existing brand awareness and knowledge among Danish consumers. On the other hand, the observations executed in the stores were able to provide some insights about the quantity and quality level of the information about Norwegian cod. In general, the branding efforts observed, could at best be labeled modest. Firstly, there were no active marketing efforts of any kind in the stores visited. The closest thing to any kind of marketing campaign was the information provided on the packaging of the cod. There it was stated, in small writing, the origin of the fish (Appendix 13).

Conclusively, both qualitative and quantitative data indicates that Danish consumers lack knowledge to form a particular impression of Norwegian cod. This shows that Danes are not given a chance to get any impression of Norwegian cod, and consequently have a low degree of brand knowledge and brand awareness of the existing brand.

The indication that Norwegian cod has relatively low brand knowledge and brand awareness, found additional support from the experts interviews with Lone Marie Eriksen (Fiskebranchen), Nicole Linde Jensen (Coop Nordic) and Jesper Lehmann (Boutique Fisk) (Appendix 7 ; Appendix 9 ; Appendix 10). All three interviewees claimed that Norwegian fish had no distinct

image or associations among the Danish consumers. More specifically, Lone Marie Eriksen stated that Danes do not have a special impression of Norwegian cod, or that they differentiate it in any distinct way. However, she did as well state that Danes in general are fond of cod (Appendix 7). Nicole Linde Jensen claimed that Norwegian cod had no specific image, except being a traditional new year's meal. Considering origin specifically, the cod could at best be considered to be a Scandinavian fish (Appendix 9). Jesper Lehmann said that Norwegian cod is not considered in any particular way. However, it could at best be considered to be a Nordic fish because it is safe, clean and origins from cold and clear waters (Appendix 10).

Based on the interviews as well, it is fair to say that the Norwegian cod does not have a high degree of awareness or knowledge associated with it in Denmark. However, it is interesting to notice that something related to CSR is mentioned. There is a certain impression of the fish being local, safe and clean. That Danes are concerned about this is also supported by a research conducted in 2006. There, some believe Danish fish is a safer choice concerning health and environmental issues, and refuse to buy fish from dams and from certain catch areas (www.miljoeogsundhed.dk). In addition there is an impression among consumers that Norwegian cod originate from cold and clear waters. That has an important link to the existing branding strategy of Norwegian cod since it is one of its main and most important features. Such a link might be taken advantage of in a branding positioning emphasizing CSR.

5.5 Sub-question 5: In terms of CSR, what competencies does the Norwegian cod industry have that might be utilized to create a unique branding positioning?

The previous discussions have included existing use of CSR as a branding element, consumers' attitudes and behaviour towards it, and what level of awareness Norwegian Cod has in the Danish market. The following will discuss the Norwegian Cod industry and competencies that possibly can be utilized to create uniqueness in a branding setting. It will be necessary because the potential CSR demands from the consumers can not be fulfilled unless the Norwegian cod industry possess the right competencies. Additionally, and in order to enlighten the competencies better, it will be necessary to evaluate the competencies of Alaska Pollock and Pangasius. The following will discuss these various areas, uncovered through the literature review and expert interviews.

5.5.1 Experience, knowledge and resources

Since the beginning of the history of Norway, fish has been an important natural resource for the coastal habitation. Exporting fish started more than 1000 years ago through the sale of dry cod to Europe. This is still the main market, and therefore also result in short travelled food, leaving a limited carbon footprint. Throughout the years the management of the fisheries has developed and changed in line with market demand and experience (www.nortrade.com). These traditions and experiences have also resulted in a modern aquaculture industry, which is know-how of importance far beyond Norwegian borders. Not only does it increase the quantity of fish, it can also play an important role in keeping the wild fish stocks sustainable as the demand for food in the world is increasing. This kind of knowledge is not only a result of historic knowledge, but also the fact that Norway has the resources to commit to such capital intensive research and development. Knowledge and capital, in combination with natural advantages such as a long coastal line and good water conditions, is a base for possible competitive advantages for the Norwegian fishing industry (www.torsk.net).

5.5.2 Industry cooperation

The Norwegian fish industry has through the years built up several entities in connection with fisheries. These have different structures and main tasks, from governmental management of the Norwegian waters, private and public research and development institutions, commercial actors etc. Fish is one of the most important export industries in Norway, and the country is the second

largest exporter of fish in the world. This results in enormous revenue, and the industry is responsible for approximately 5% of Norway's total export value (www.regjeringen.no). Such an important industry is therefore important to the country and result in many involved stakeholders. Through the years these entities have developed a good cooperation and a "unique cooperative effort among industry, government, non-governmental organizations and research institutes, which has created a regulatory, research and information network that tracks Norwegian fish from fjord to fork. This is guaranteeing that Norwegian fish and seafood are sustainably produced, healthy and humanely treated, and they are safe and nutritious to eat (www.nortrade.com). One such example is the system of the Ministry of Fishery, the Directorate of Fisheries, the National Institute of Nutrition and Seafood Research and NSEC. Each organization executes its own tasks and cooperate together to create the surveillance system. This leads to thorough risk management, ensuring seafood safety and protects customers' interests (www.seafoodfromnorway.com (#4)). To depict the large number of stakeholders, the following is showing just a handful of these:

- **Norwegian Ministry of Fisheries and Coastal Affairs** has responsibility for the fisheries and aquaculture industries, seafood safety and fish health and welfare, harbours, infrastructures for sea transport and emergency preparedness for pollution incidents (www.regjeringen.no (#3))
- **The Directorate of Fisheries** advice the Norwegian Ministry of Fishery and coastal affairs and is the enforcing agency of the policy made by them (www.fiskeridir.no).
- **Norwegian Food Safety Agency (NFSA)** ensure that the product sites are following regulations of cleanliness and approve the exported fish (www.norway.org).
- **The Norwegian Institute of Food, Fisheries and Aquaculture (NOFIMA)** is a business-oriented research group working in research and development for the aquaculture, fisheries and food industry in Norway. They provide research and solutions at an international level which will give a competitive edge throughout the value chain (www.nofima.no (#3)).
- **National Institute of Nutrition and Seafood Research (NIFES)** is a research institute with administrative duties, linked to the Ministry of Fisheries and Coastal affairs. The institute's research focus is nutrition: feed for fish - and fish as food. The institute gives scientific advice to the government and food authorities concerning health and safety aspects of wild caught and farmed seafood (www.nifes.no).

- **Fishery and Aquaculture Industry Research Fund (FHF)** is a state funded R&D agency, focusing on both wild caught seafood and aquaculture (www.fiskerifond.no).

5.5.3 Research and Development

Many of the stakeholders presented above also work with research and development. The most important aspect of the R&D is the mentioned cooperation with the industry and other stakeholders. There are many small specialized research clusters, which drive the industry forward, e.g. the University in Bergen's work toward marine biology (www.uib.no), and the marine research cluster in Bergen (<http://www.bergenmarine.no> ; Appendix 8).

It can be argued that there are two areas Norwegian R&D is especially competent within. These are fishing gear development and aquaculture (www.nortrade.com). In these areas the Norwegian industry is world leading. Being the leader in these two industries consequently give special opportunities of having a head start in the production of products covering the market needs. Linked to the strict governmental regulations in Norway, the R&D in these two industry areas will then most likely aim to be socially responsible. It is thereby assumed that the Norwegian industry set the standard, and have in many cases the opportunity to take patents etc, which, in turn, might lead to competitive advantages. These advantages can be argued to be achieved due to the historic aspect discussed above, the mentioned cooperation within the industry, and perhaps most important the economic resources available. The government has the fishing industry as an area of special interest and fund several projects and research entities. In 2005 they contributed with more than NOK 800 million in research (www.nortrade.com). At the same time there are investors that see the potential in the Norwegian industry, such as Marine Harvest, Aker Group, Grieg Group etc. This seems to ensure that Norway presently is one of the drivers within the industry globally, and likely will be holding this position in the future as well.

5.5.4 Rules and regulation

As fisheries have played such an important role for decades, there have been developed governmental laws and regulations which shall ensure CSR. Especially important is the sustainable management. Fishery in Norwegian is based upon a heavy regulated stock quota system. These quotas are based upon international objective research done by the International Council for Exploration of the Sea (ICES), in addition to national research agencies (www.nortrade.com). Norway has for years had a policy of not accepting any dispatch of by-

catch. This means that fish caught, which can not be included in the quota, can not be thrown back to sea. By this the control of all catch can be registered and all catch can be used as food or for other means. This is an important part of keeping all species sustainable. The regulations are intensively enforced by the coastal guard (www.ub.uit.no) and different land-based entities. Any breach of the regulations can result in huge fines or prison sentences up to six months (www.regjeringen.no (#4)).

To be able to trust the food and its quality, there are also governmental inspections later in the value chain to enforce strict regulations of how food shall be handled etc. The Norwegian fish industry has therefore a very trustworthy handling of the fish, which can prove important in the social psychology aspect of branding (Elliott & Percey, 2007). Another aspect is to ensure that the fish is healthy. To be sure that the fish has not been in contact with or added any unhealthy substances, governmental regulations and enforcement is regulating this as well. Regulations count for fish from both wild and aquaculture, and there is no difference in the treatment of fish sold nationally or for export. This can represent a safety element for the international purchasers.

The Norwegian coastal fishery regime has been awarded the highest score in the world through an analysis by University of British Columbia, and WWF has used the ground-fish regime as an example to follow (www.nortrade.com). In addition the cod fishery is controlled by 'Det Norske Veritas', ensuring that the quality standards of the industry are followed (www.seafood.no (#3)). WWF has also put Norwegian Cod under their "Green light" on their sustainable seafood list, stating the "the management is good and the environmental impact is small" (www.intrafish.com (#7)). WWF also state that "Cod from the Barents Sea is one of the cleanest types of food one can eat" (www.nrk.no). This approval from such an influential organisation as WWF, can be of great importance in the positioning of Norwegian cod. A third party approval can help increase the customers' involvement and more easily move them into emotional realm. They can give the customer what Elliott & Percey (2007) define as reassurance and result in a consumer benefit of being able to make a safe choice. Presently the wild cod stock in the Barents Sea undergoes an assessment by the Marine Stewardship Council (MSC), expected to be finished during 2009. This will also help in developing a brand which can push the customer up the involvement ladder and into a emotional realm.

5.5.5 Competencies of Alaska Pollock and Pangasius

To underline the Norwegian competencies more thoroughly, it is useful to conduct a review of the Alaska Pollock and Pangasius industry as well. The review will identify some of the competencies the two industries possess in terms of CSR.

Alaska Pollock is the largest fishery in the world, and produce 1.22 million tons divided among more than 1000 products each year. In addition to low prices, they claim to be the white fish with the highest quality for value-added products (www.alaskapollock.org #1). They have an environmental focus with more than 30 years of sustainable management. This has lead to certification by MSC, enabling them with a third-party label of sustainable and traceable production. Their sustainable management is based upon mid-water trawl net catch with special designed nets and minimized bi-catch and tow time. To ensure healthy production, the industry is regulated by the State of Alaska Department of Environmental Conservation. The management system is regulated by North Pacific Fishery Management Council (NPFMC), and is regarded as a model for ecosystem-based sustainable fisheries management (www.alaskapollock.org #2). They base quotas on scientific evidence, gathered by federal scientists. There are also efforts made by the industry itself to increase the knowledge about the regional waters, to reduce bi-catch, and to contribute to hunger relief programs. In addition, the Alaska Pollock is traceable all through the value chain.


Pangasius has a substantial shorter history. In 1995 it was produced 10 000 tons of the fish. In 2008 the number had increased to 1.1 million tons (www.worldwildlife.org #1). The main benefit of this specie is its low production costs (www.seafood.no #8), and thereby low prices to the consumers and possibly good margins to the distributors (Appendix 13). The growth has been possible due to enormous demand in the marketplace for low priced whitefish, but seems to have caused substantial environmental impact. Environmental issues raised by the WWF has, amongst others been water pollution and waste management, unhealthy genetics and bio-diversity as fish escapes and mingle with wild species, problematic health management due to use of antibiotics, unsafe and unethical labour environment and conflicts between the different producers (www.worldwildlife.org #1) . To front these issues, there has been arranged so-called Pangasius Aquaculture Dialogue Workshops. This has raised many different areas of focus, and the solution agreed upon is to *“Promote quality changes in the entire value chain using sustainable approaches to generate national added value”* (www.worldwildlife.org #2). To

reach this goal, a ten point long solution plan for 2007 – 2010 was developed (www.worldwildlife.org #2). The following points influence their social responsibility impact:

- Develop production and manufacturing standards
- Establish strong links between government and producers through the manufacturers/processors
- Build community level farm management institutions
- Develop centralized planning of farming zones
- Protect and improve brood stock genetic integrity and quality
- Industry-wide changeover to industrially manufactured feed
- Research and apply vaccines and biotechnology solutions
- Create a national brand name and distribution system
- Upgrade knowledge, training and improve conditions of the workforce

It is quite clear that they are facing many challenges, and that their operations are not at the same level as Norwegian cod and Alaska Pollock in terms of CSR. However, the work of reaching the goals is in progress. An example of that is the initiatives for developing farming standards (www.vnbusinessnews.com), a result of WWF's involvement through the mentioned Pangasius Aquaculture Dialogue Workshop. There are also other forces that are involved which can get the Vietnamese industry up to pace with the others. An example is Norwegian Marine Harvest, which see commercial interests in the industry and is sharing their know-how in developing the industry through their PangaProgress Program initiative (www.thefishsite.com).

The review of the competencies of Alaska Pollock and Pangasius reveal two important things. Firstly, it shows that Pangasius is lacking behind compared to the two other fish types. The competencies they possess do not contribute to socially responsible operations. Even though the present situation seems bad, the Pangasius industry have plans and strategies for improvement. Secondly, the review shows that Alaska Pollock is more or less on the same level as Norwegian cod in terms of competencies that might contribute to operations being socially responsible. In general, it seems like CSR is taken care of throughout the entire value chain, which is the case for Norwegian cod too. For example, the waters where both of the fish types are harvested are controlled by strict regulations ensuring sustainability. Conclusively, it is clear that Pangasius do not have good enough competencies to ensure well-functioning operations in terms of CSR.

Norwegian cod and Alaska Pollock, on the other hand, possess competencies that enables them to make their operations socially responsible. The competencies in themselves tend to be more or less equal. One of the few exceptions to this, is perhaps the advantages Norwegian cod has in terms of their waters being very close to the Danish end-market. That of course has impacts on important environmental issues such as carbon footprint. Since the competencies of Norwegian cod and Alaska Pollock are more or less equal, it will be how they are applied and combined that will determine their ability of creating a unique CSR positioning. 

To summarize, the Norwegian cod industry is in a good position concerning competencies in terms of CSR. As Aker Seafoods' Morten Jensen said: *"Norwegian fish industry has the best story in the world to tell, and should do so proudly"* (Appendix 12). Even though the statement is somewhat coloured by the fact that Jensen represent one of the largest exporters of Norwegian fish, he does have a good case. The above discussions leave no question about the dedication and skills the industry has, and how they play each other good. This in combination of natural resources, world-class governmental regulations, globally leading R&D and decades of a priceless experience, place the Norwegian fish industry high in a global setting. However, they face tough competition from Alaska Pollock. But as argued, the way they apply and combine their competencies still leaves a potential to create a unique CSR positioning.

5.6 Sub-question 6: How is the future potential of using CSR as a branding element in the branding strategy of Norwegian cod in Denmark?

This question will discuss and analyze the future potential of CSR as a branding element. More specifically, it will consist of four parts. It will start with some general thoughts about the future of CSR and its impact on consumers. Thereafter, it will discuss which specific CSR issues are believed to become important for consumers. Thirdly, the development of the need of CSR will be discussed, meaning how strong it might become. Finally, it is necessary to view the three parts in connection with the competencies of the Norwegian cod industry.

5.6.1 General thoughts about the future of consumers and CSR.

The secondary sources investigated, do in general indicate that the future of CSR as a branding element is positive. Such an argument can be based on the fact that most of them state that it will become more important for consumers, and that they also expect a growth in the markets for socially responsible goods. For example, it is expected that the organic / ecological market will have doubled itself in terms of revenue in 2013 compared to today. In 2008 the total market value was about 4,5 billion DKK. In 2013 the number is expected to be approximately 9 billion DKK (www.fremtidenslandbrug.dk)

In a scenario analysis presented in “Økonomisk Fiskeriforskning”, a magazine about research and development within the fields of strategy, economics and market, CSR is believed to play an important role in forming the future of consumer trends (www.fiskeriforskning.net). The scenario which is based on in-depth interviews with stakeholders within the whole cod value chain, believe that the consumers will demand more environmentally friendly food and food with a message. Message can here be defined as something that signals that the food is socially responsible. The stakeholders interviewed are mostly based in Norway, but since they also include exporters, and the fact that Norwegian fish industry is part of a global market, it is assumed that the scenarios are representative for international markets as well.

The demand of more environmentally friendly food will arise because the feeling and belief that we are approaching different environmental crisis, will lead to a change of attitudes among consumers. Today, it can be argued that this belief and feeling still has not reached the

consumers. For example, there is a constant debate going on about the actual consequences of the climate changes. The Heartland Institute, an American think tank, has since the first report about the climate changes was developed by the Intergovernmental Panel on Climate Change (IPCC), been skeptical to their findings and predictions (www.aftenposten.no). Whether they are right or wrong in their counterattacks on the IPCC reports is not important here, the point is that consumers are often faced by contradicting data which makes it very hard for them to take a standpoint. It will be hard to take a standpoint not only in a debate, but also in a potential purchase situation.

From several sources, it has been argued that consumers ignore information if there is too much information to relate to. This can be exemplified by considering the case of the MSC brand and brands similar to it. Svein Hallbjørn Steien from Innovation Norway states that there are too many of those kind of brands. The amount of information presented to the consumer through all the brands tends to confuse them instead of helping them making a deliberated choice. This can make them ignorant and indifferent to all of the brands (Appendix 8). The result is that they choose to ignore making such brands part of their purchase criteria. Instead they choose to base their purchase decisions on easier and more comparable factors. The same view is supported by Morten H. Jensen, Executive Vice President Sales and Marketing at Aker Seafoods. He says that too many brands and corresponding information result in cognitive dissonance (Appendix 12).

One can, consequently, expect that when the feeling and belief of an emerging environmental crisis is based on clearer and more stable information, a demand for CSR will be stronger. It is fair to assume that the information eventually will become clear and more stable since there is research about the environmental crisis being conducted constantly.

The purchasers and the expert on Danish fish consumption all consider the future of CSR as a purchase criterion for consumers, and as a branding element, as positive. Lone Marie Eriksen from Fiskebranchen, stated that she believes there is a future potential. More specifically, she believes that CSR will play a more important role in the consumers' minds and in their purchase behavior in the future. Additionally, she also states that she thinks that CSR as a branding element has the potential to become profitable. She predicts a 10 year horizon for it to reach its branding potential (Appendix 7).

Nicole Linde Jensen from Coop Nordic is certain that CSR will become important, both in terms of consumer behavior and in terms of branding potential. She as well believes it will take 5 – 10 years before one can expect it to have reached its potential (Appendix 9).

Jesper Lehmann from Boutique Fisk states that he is optimistic concerning the future, and that 5 years are needed for CSR to reach its potential (Appendix 10). Furthermore, he also claims that it is necessary to educate the consumers about CSR and the advantages and consequences associated with it.

5.6.2 What CSR issues are believed to become important.

Based on the thoughts and beliefs of the cod value chain experts, the following three main CSR themes can be identified:

1. Environmental concerns
2. Sustainability concerns
3. Ecology concerns

Environmental concerns focus in particular on CO₂ emissions. Espen Tind Nordberg from WWF and Lone Marie Eriksen from Fiskebranchen specifically mention this as an important future issue (Appendix 11 ; Appendix 7). Eriksen, moreover, believes that as a consequence of increased focus on CO₂ emissions and carbon footprint, the consumer will favor local fresh fish instead of frozen fish. The reason for this is that frozen fish often has traveled long distances in order to be processed (Appendix 7). This can further be interpreted as a matter of origin, and that consumers will favor fish originating from waters closer to their market. Nicole Linde Jensen of Coop Nordic also states that origin will be important. She claims it will be a good way to show responsibility because a lot of different CSR associations are possible to connect to origin (Appendix 9).

The second concern, sustainability, is mainly about fish as a source of food for humans, and the methods used to catch fish. On a general level, sustainability is, at the present time, believed to be important within fishery by only 5% of the Danish people. But in the future this number is expected to increase (Appendix 7). WWF's sustainability focus is on fish as a source of food for humans. They believe this will be an important issue for consumers because of the challenges the increasing number of global citizens will bring, in terms of pressure on the world's food

sources. In 2050 there will be 9 billion people on the earth (Appendix 11). Fish, and in particular farmed fish, will be of importance because it will serve as a good, healthy and renewable source of food which puts relatively little pressure on the earth's food sources. Also it can contribute to distribute the wealth of the planet more equally since less resources are used when there is more emphasis on farmed fish (IBID).

Lone Marie Eriksen from Fiskebranchen thinks that fishery regulations will become more important in Denmark. As examples she mentions fish quotas, and the size of the mesh in the trawls. The size is important because it has consequences for what bi-catch ends up in the trawl. Not wanted bi-catch is often just disposed off, and that is a waste of resources and might turn out to harm parts or the whole aqua ecosystem. Additionally, concerning sustainability, Nicole Linde Jensen (Coop Nordic) believes that the MSC will become even more important (Appendix 9).

The third and last concern identified, is about ecology. Both Nicole Linde Jensen and Jesper Lehman mention these as areas of CSR that will be important in the future (Appendix 9 ; Appendix 10). Lehman more specifically mentions that the fish should be natural, meaning that fish preferably should be wild caught (Appendix 10).

5.6.3 How will the CSR need develop?

As indicated earlier, consumers' need of CSR can be of different strength. More specifically, it tells something about the personal relevance and importance it has for an individual. As stated in the theory chapters, this gives incentives as to how much involvement a consumer puts into a buying process.

Previous discussions claimed that CSR is desired by the consumers, the consumers expect others to take care of CSR and consumers react more strongly to negative CSR incidents than positive ones. We have chosen to label the two latter ones *marginal importance*, since they do not show support for active and positive CSR branding initiatives. How the future consumer need of CSR will develop, if it will be actively desired or if it will be of marginal importance, will consequently have great impact on a branding initiative emphasizing CSR. It is thus interesting and necessary to bring about some thoughts on the topic, in order to enlighten CSR's branding potential further.

Support for an active desire of CSR is found in statements from Jeremy Horton, Category Development Director at Young's Seafood. He says that trends towards ethical purchasing are one of the factors shaping their new product offerings. As well lighter eating is a trend among consumers, which also affects the products they offer. That Young's Seafood actually shape their product offerings according to these trends is a quite clear indication that CSR is desired by the consumers (www.intrafish.com (#8)). It has to be mentioned that these statements are primarily based on trends in the British market. However, since Denmark is a small nation and open for impulses from abroad, it is fair to assume that such trends might be observed there as well; especially what concerns lighter eating. According to Sunhedsstyrelsen, the number of overweight people in Denmark has increased by 75% since 1987. Today, 30 – 40% of the adult population is obese (www.sst.dk). Calculations done by Statens Institut for Folkesundhed, indicate that the number of both moderate and severe obesity will keep on increasing the coming ten years, among both men and women (www.si-folkesundhed.dk). Since cod is a light and healthy source of food, it is fair to assume that consumers who are concerned about health issues, such as obesity, will want fish and thereby also be more receptive of branding initiatives focusing on exactly that.

As discussed previously, the expert interviews also paint a picture of CSR being something that the consumers will desire. In general they had a positive view of the future of it as a branding element. However, a few of the expert statements did moderate the view as well. For example, Lone Marie Eriksen of Fiskebranchen stated that the MSC label has the potential of being the deciding factor when the consumer is faced with the decision of choosing between two identical fish products (Appendix 7). Such a prediction, indicates that CSR, in this particular case sustainability, has a more marginal importance since it is triggered in the consumer only when all other decision factors are considered. This indication is supported by Klein and Dawar's research (2004), which argues that CSR does affect consumers' evaluations and willingness to pay. However, it does not play a significant role. It is only a deciding factor in consumer behavior over and above economical and rational considerations. More specifically, they propose that *"while social responsibility plays a role, traditional constructs such as product attributes and consumption goal still account for the bulk of the variance in consumer behavior"* (Klein and Dawar, 2004).

Many leading retailers and analysts also support the view that consumers' CSR needs will be of marginal importance. According to Jonathan Banks of AC Nielsen, consumers *"expect supplies*

to be ethical, and in a few years it will not even be a differential” (www.intrafish.com #9). Moreover, he also argues that ethical sourcing will be necessary just to stay in the game (www.intrafish.com #9). This implies that consumers do want ethically sourced products, but it does not have the potential to make the consumers value the product higher. It will become a basic demand that the producers and suppliers need to fulfill just to stay in the game. In branding context, such a scenario makes CSR a point-of-parity rather than a point-of-difference.

Based on the data available, it is hard to conclude which way the need of CSR will develop. Even though it is hard to conclude the either or other way, it is still necessary and valuable to bring up and discuss the topic. It is so because it depicts quite well the potential impacts a branding strategy emphasizing CSR will face. Both NSEC and the Norwegian cod industry have to be aware of the different directions the development can take, so they do not lock themselves in just one specific position. This ensures a dynamism that enables them to more smoothly and rapidly adjust to new trends, and to better exploit the existing competitive advantages they might have.

5.6.4 How can the Norwegian cod industry prepare itself?

5.6.4.1 Matching needs with competencies.

As discussed previously, three CSR issues were identified to possibly be important for consumers in the future. The first one concerned the environment. Especially CO₂ emissions and the carbon footprint were mentioned as being of importance. A consequence of this concern could be that Danish consumers would favor food with a more local origin. If this focus becomes a reality, the Norwegian cod industry has special competencies that might turn out to be advantages in a possible branding positioning. As mentioned in SQ5, there is closeness to the market that can fulfill the demand of more local food. Since Norwegian waters are so close to the Danish market, the CO₂ emissions of the logistics processes will be much lower than the ones of Pangasius and Alaska Pollock. However, this will not be the case for cod that is processed in low-cost countries such as China, which is the case for some of the Norwegian fish companies (e.g. www.oceantrawlers.com). Furthermore, the Norwegian cod industry also has competencies in terms of research and development it can take advantage of. As stated in SQ5, Norway is especially competent concerning fishing gear development. For example, it is constantly conducted research on how to reduce the CO₂ emissions and the carbon footprint related to the fishing activities. Domstein, a significant Norwegian fish company

(www.domstein.no), claims that line fishing is more environmental and resource effective than other catching methods. Per kilo fish, the CO₂ emissions are five times lower than trawl fishing, a claim that has been embraced by the MSC label (www.netfisk.no).

Governmental institutions are also concerned about reducing the environmental impact of fishing. The Norwegian Institute of Food, Fisheries and Aquaculture (NOFIMA), presented in SQ5, is doing research on strategic choices of catching , production and technology methods and how these affect the energy use in the seafood industry and its environmental impact (www.nofima.no #4). That such research is conducted might be an advantage because it shows a dedication to the environment that the consumers might value. According to Trudel and Cotte (2008), the value might eventually lead to a higher willingness to pay. In their research, they concluded that the relationship between ethical behavior and consumers' willingness to pay was strong, which can be related to the branding theory of Keller (1993), making Norwegian fish favorable and possibly unique to the consumers.

Future sustainability issues of concern are believed to be fish as a food source and catching methods. In relation to the first issue, it was mentioned that fish farming would be an important business in order to provide a secure and stable access of fish for the growing world population. The Norwegian fish industry, with its old and proud traditions of harvesting the sea, could be in possession of important competencies that could be used actively in a branding strategy. In general, Norway has good competencies in developing the farming industry (www.torsk.net). Together with Scotland, Norway was actually a first-mover, and introduced the first salmon farms in the late 1960s (www.seafoodcanada.gc.ca). That Norway was a first-mover in this industry, and that it has grown to an important business in Norway with massive support from the government, is a valuable asset that can be used to develop the cod-farming industry even further. Developing a solid cod farming industry is actually a priority of the Norwegian government (www.regjeringen.no #5). Taking advantage of the cooperative competencies of the Norwegian fish industry could be of great value as well. As stated previously, there is a good cooperative environment and culture within the Norwegian fish industry. The cooperation includes both actors within and outside it. The cooperation competencies could be valuable because it could enable the cod industry to learn from the experiences of the salmon industry.

Concerning the catching methods, Norway is also in a position that should enable them to meet the demands of the consumers. In general, Norway is considered to be a frontrunner in the

development and production of fishing equipment (www.nortrade.com). NOFIMA, for example, is one of the actors contributing to this. They do research on catching methods in relation to production and market needs (www.nofima.no #5). On a regulative level, Norway is also a leader. In March 2007 the European Union imposed the first steps for banning discards of catch, which is often a result of bad fishing gear. This new initiative, however, was already a rule in Norwegian waters (www.intrafish.com #10).

The last CSR issue believed to become important for consumers, is ecology. Ecology was discussed in very general terms. However, the importance of the fish being natural was mentioned. According to NOFIMA, Norway, together with Sweden, are world-leading in setting standards and rules for ecological food (www.nofima.no #6). Moreover, a lot of research is being conducted in order to make the fish as clean and natural as possible. Moreover, this can actually be something which can fulfill the need of the “natural fish” Lehmann foresaw as an important demand in the Danish market. That concerns specifically farmed fish. PHARMAQ and Intervet Norge AS, have for example provided crucial contributions to the research and development of fish vaccines. Norwegian aquaculture now uses less than 500 kilograms of antibiotics to produce 700.000 tons of fish. Svein Halbjørn Steien stated that *“we are 100% sure that we do not sell fish that contain antibiotics”* (www.nortrade.com). The National Fishery and Aquaculture Organization is also concerned about delivering clean and natural fish. For instance, they focus on ecological storage and making sure that no unknown chemicals are added to the fish.

To have such support organizations, such as the research and development organizations presented in SQ5, is very valuable for the Norwegian cod producers. They are both a direct support in the production, and might also work as an extra source ensuring more reliability in a branding positioning. Danish consumers have stated that credibility should be created through a third party (www.norden.org). That desire could be ensured by using such organizations.

5.6.4.2 The strength of the consumers’ need of CSR.

As for the strength of the consumers’ need of CSR, it is obvious that market intelligence and monitoring is needed in order to be up-to-date on what is going on in the consumers’ minds and actual behavior. NSEC will then play an important role, since it is one of their most important tasks.

To conclude, the future of CSR seems relatively bright. It is believed that CSR has a better potential to be to a branding element in the future, than what is the case for the present situation.

6 Conclusions & Recommendations

It is now time to sum up and conclude the research and findings from sub-question 1 – 6, and see how they, put together help answer the thesis' research question. In the following, we will return to the main framework of the thesis, namely Keller's customer based brand equity (1993), and try to answer what potential CSR as a branding element has in the in the branding strategy of Norwegian cod in Denmark. CSR will be treated as an association or attribute, and will be evaluated based on the customer based brand equity model.

The evaluation will start by considering CSR's potential of contributing positively to the brand image of Norwegian cod. Following that, and evaluation of the brand awareness will be made.

As presented in the theory, the brand image is put together by four different parts, namely *types of brand associations*, *favorability of brand associations*, *strength of brand associations* and *uniqueness of brand associations*. It was early on in the project concluded with the fact that CSR can be defined as an attribute, and thereby be subject for an evaluation where the attribute's favorability, strength and uniqueness is discussed.

6.1 Uniqueness of brand associations

The first research conducted concerned comparing Alaska Pollock, Pangasius and Norwegian cod. More specifically, the comparison aimed at mapping which, if any, branding initiatives emphasizing CSR that were utilized by the different fish types. From this mapping, a relative positioning was made. The positioning furthermore had implications for the uniqueness. Moreover, the comparison not only depicted the current use of CSR. It also gave implications for future use, because the positioning can be utilized as a point of departure in order to decide in which direction to navigate to create a unique CSR branding strategy.

The research revealed that the Danish fish market is not overwhelmed with CSR branding initiatives. In general, it is not used either very vastly nor actively as a branding element by neither Norwegian Cod, Alaska Pollock nor Pangasius. Consequently, the three fish types are positioned relatively close to each other. However, two exceptions to the main pattern was observed. The first one was the very clear CSR focus of Butler's Choice and its Pangasius. The second one, was the various labels containing some kind of CSR message, such as MSC. Since

it is, in theory, possible for all fish products and brands to obtain these labels, they may not constitute a point-of-difference.

Based on the findings, CSR has at the present time not been utilized well enough by any of the three fish types so that a unique selling proposition has been created. That it has not been utilized, also implies an unexploited potential, and a possibility to create a more unique positioning. From the comparison between Norwegian cod and its two rivals, it is fair to conclude that CSR has a potential to be incorporated in the branding strategy of Norwegian cod in Denmark.

6.2 Favorability of brand associations

The next step in the research concerned consumers. Favorability of brand associations was used to evaluate them.

When evaluating the needs it was considered necessary to divide it in two, namely attitudes and actions. This had to be done because fighting off the market challenge is not only a question of positive attitudes, but also a question of positive behavior. Positive behavior meaning that consumers buy cod because the cod has an element of CSR they find desirable. The need of it was furthermore necessary to compare to other, more traditional, buying arguments concerning fish.

Based on attitudes, it was quite clear that CSR was desired by the consumers, and that it had the potential to affect them in point-of-purchase decisions. None of the data used in the research actually showed a clear negative attitude towards CSR. However, some data argued that CSR should not be of concern for the end-consumers. It should be taken care of somewhere before the product reaches the store. In a way, one can claim that this is something that constitute a negative attitude towards CSR since the end-consumers do not want to think about it and evaluate it in a purchase situation. But allover it was concluded, that based on attitudes, CSR had a good potential to be part of the branding strategy of Norwegian cod in Denmark.

However, attitudes were one thing, actions something totally different. The research showed that there was a huge gap between attitudes and actions; only a small number of consumers did

follow through their positive attitudes with real-life actions. Based on the actual behavior and actions of the consumers, it was argued that CSR was not needed or desired. Consequently, it was concluded that CSR was not able to affect the consumers in a point-of-purchase decisions.

Because actual behavior is what fights off the market challenge at the end of the day, and because the gap between attitudes and actions was so vast, the actions counted as being of more importance than the attitudes. Based on the ability of CSR to affect the consumers in point-of-purchase decisions, it was concluded that the potential to use it in the branding strategy of Norwegian cod was insufficient.

The conclusion that CSR is not particularly wanted or desired by the consumers, received more support when a comparison between CSR as a buying argument and other, more traditional buying arguments, was made. In general, it was found that CSR is considered to be important only after the traditional decision criteria have been evaluated. The more traditional criteria had to be evaluated as to be of equal value before a consumer would consider CSR.

The traditional criteria particularly included price, quality and availability. In a psychology-of-brands setting, those can be labeled as functional criteria, since it can be argued they are mainly concerned about keeping the promise of a good performance. They are not on a level of emotional realm, for example social meaning, where it would be more likely to find CSR. Moreover, it is also so that people use very little time to decide what fish to buy; according to the findings it is less than one minute. Since these factors are found, it is likely that CSR will be of marginal importance. CSR would demand a certain level of deeper involvement than for example just comparing the price on the products, since it is connected to deeper and more personal values.

From a perspective focusing on the consumers, it was, all in all, concluded that CSR did not have a sufficient potential to affect them in point-of-purchase decisions, and also that it was of marginal importance compared to other, more traditional buying arguments. Consequently, CSR's potential to be included in the branding strategy of Norwegian cod in Denmark is not sufficient enough.

6.3 Brand awareness and strength of brand associations

The research conducted about the present image of Norwegian cod in Denmark, showed that Danes have little knowledge and few associations about Norwegian cod. Both secondary sources, store observations and expert interviews confirmed this. Neither in a qualitative nor in a quantitative manner, the information about Norwegian cod was considered to be sufficient. However, some associations about it were found, such as Norwegian cod being relatively local and safe.

These findings constitute both opportunities and challenges. They are a challenge because it might make the brand building process more vast and complicated. This will be so due to the fact that it must be built more or less from scratch, and there are not many existing associations that can assist in the building of the brand.

It is an opportunity as well, because there are not identified any associations that puts any limits on building the brand with a clear CSR element. One has a clean foundation which can be used to develop the brand in the way one desires. The previously mentioned existing brand associations provide opportunities as well, because they can potentially be linked to CSR.

Due to the fact that there is a clean foundation, and that there are no barriers present in terms of negative brand associations, it is concluded that the brand awareness and the strength of brand associations provides a positive potential to include CSR in the branding strategy of Norwegian cod in Denmark. However, it is necessary to mention that NSEC must be willing to invest in such a brand building even though it means it might be a huge operation since it more or less has to be done from scratch.

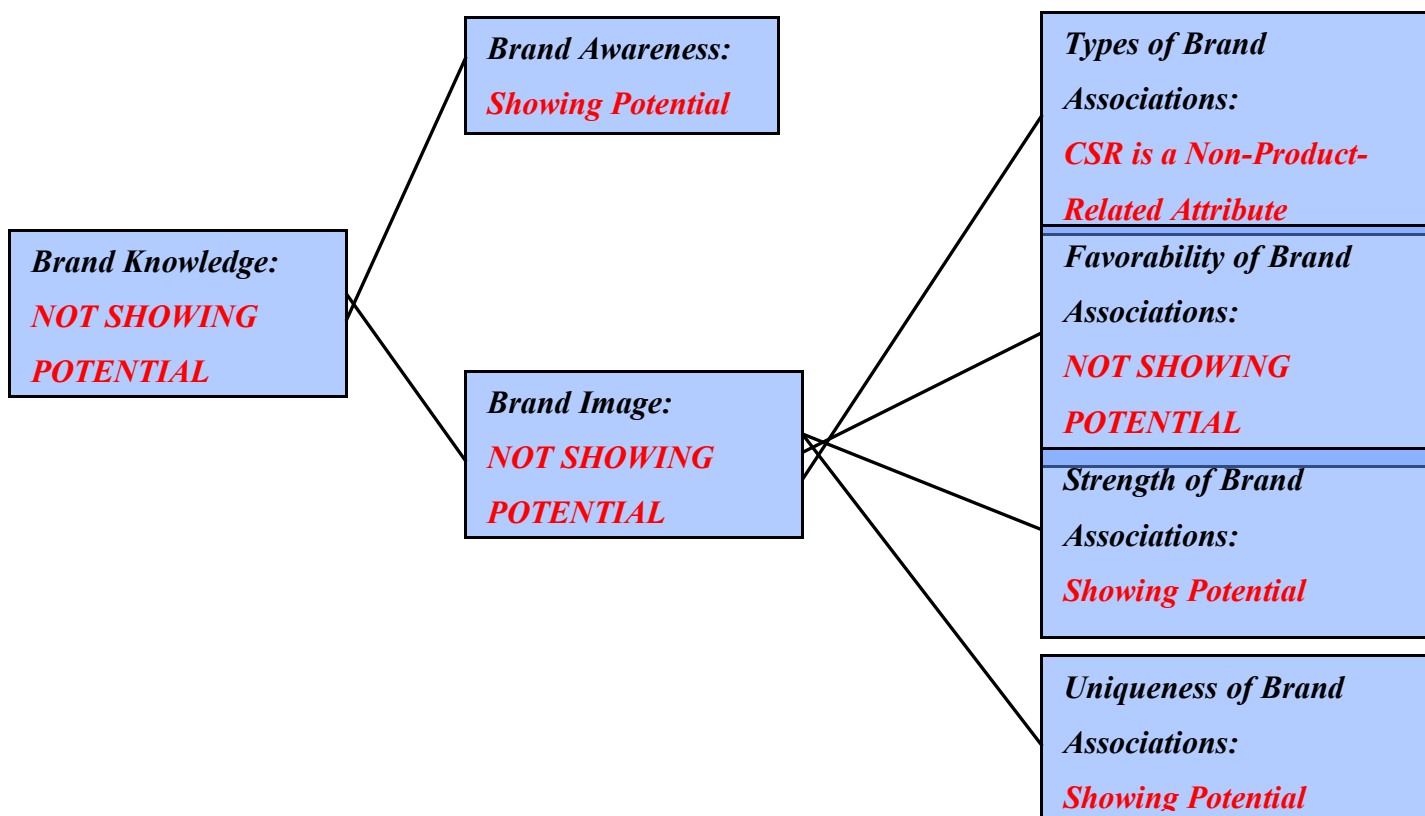
6.4 Competencies of Norwegian cod – a contribution to uniqueness

It was not only necessary to look at external aspects when evaluating the potential of CSR as a branding element. Also an internal view was needed. Basically, it was needed because it complements the discussion of uniqueness. The Norwegian cod industry and NSEC can not just communicate the CSR issues that are demanded by the consumers. They must also be able to prove and live up to whatever they say. In other words, it is crucial that the industry itself and its operations are able to deliver what that they claim to do or be.

The internal research revealed that the Norwegian cod industry has many unique competencies that can prove to be valuable in a branding setting. Examples include that the industry has world-class rules and regulations, world-leading research and development and valuable experience. The competencies are much better than the ones of Pangasius, but they face tough competition from the ones of Alaska Pollock. Since the level of competencies is believed to be very much alike as the level of Norwegian competencies, the clue to create uniqueness will be the way they are applied and combined.

All in all, the internal perspective supports, in a positive way, the potential of CSR as a branding element in the branding strategy for Norwegian cod in Denmark.

Summed up, the research of the present situation of the potential CSR has as a branding element for Norwegian cod can be presented in the following figure (Fig.8):



The findings and conclusions presented so far are only based on the current market situation. However, the interviews conducted did as well reveal an optimistic view about the future of CSR as a branding element. This view was considered to be of such interest that a research about the future was executed.

As mentioned, an optimistic view of the future was revealed among the experts. They were all consistent in their statements and believed that 5 – 10 years are needed in order for CSR to reach its potential. Furthermore, environment, sustainability and ecology are believed to constitute the central and most important issues. If so happens, the Norwegian cod industry seems to have the necessary competencies to take advantage of this.

Even though the future seems positive, one should be aware of, and carefully consider the development of the need of CSR. How important and desired it will be perceived by the consumers, have crucial implications for the branding potential of CSR.

All in all, a general positive picture of CSR is depicted. Thereby it is concluded that in the future, it has a good potential to be an element in the branding strategy of Norwegian cod in Denmark.

It is necessary to mention that the above conclusion has a lot of uncertainty connected to it. The development of social responsibility might develop in different ways than what the experts predict. Additionally, the market challenge might not exist in 5 – 10 years or might have totally different “characteristics” or “features”.

6.5 Answering the research question

One can from the different sub-questions observe both pros and cons of using CSR in the brand strategy of Norwegian cod. Weighted and compared against each other, the following answer is given to the research question:

Research question:

What potential has CSR as a branding element in the branding strategy of Norwegian cod in Denmark?

Answer:

There is, at the present time, not sufficient potential CSR, as a branding element, to be a part of the branding strategy of Norwegian cod in Denmark, and thereby enable it to fight off the market challenge.

Given that the depicted future scenario becomes a reality CSR does have a potential as a branding element in the branding strategy of Norwegian cod in Denmark.

6.6 Managerial implications for NSEC

As a last contribution to the thesis, it is necessary to provide some managerial implications for NSEC. Based on the research conducted, the following should be emphasized by NSEC:

- There is at the present time not a wise move to engage in a branding strategy focusing on CSR in order to fight off the market challenge
- NSEC should limit their use of CSR to what they already do because the demand does not exceed this level
- NSEC should use the branding strategy in general more actively because there is a huge potential to increase the awareness and knowledge of Norwegian cod in Denmark
- NSEC should keep a close eye on the market because it is predicted a brighter future for CSR as a branding element

- Start preparing for the future needs of CSR now and possibly establishes a first-mover position.

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Appendixes:

Appendix 1: E-mail Morten Hyldborg Jensen:

Hei Morten!

Fikk mail fra Line Kjelstrup idag med den gledelige melding om at du kan ta deg tid til en times intervju i anledning vår masteroppgave. Prøvde å slå på tråden tidligere idag uten å treffe deg, men du har sikkert tatt helg i det fine været. Håper derfor vi kan få avtalt et tidspunkt for intervju over mail istedet.

Forsto på Line at du er på reise neste uke, men om du er innom Oslo og vil treffes allerede da så si gjerne ifra. Jeg tilpasser meg selvfølgelig når det passer deg best, men foreslår i deres lokaler på Aker Brygge i løpet av mandag eller tirsdag 13/14 juni.

En liten introduksjon til hva vi ønsker å snakke med deg om:

Vi er to karer fra Handelshøyskolen i København som undersøker om det er grunnlag for at social responsibility bør være et element i brandingstrategien for norsk torsk, og ser på det danske markedet i forhold til dette.

Vi har en bred tilnærming når det gjelder social responsibility. Fritt oversatt fra engelsk bruker vi følgende definisjon: "Det ansvaret bedriften har til å skape verdier med bruk av virkemidler som unngår å skade, beskytter og forsterker samfunnets verdier"

Basert på dette er vi ute etter tanker du gjør på området. For eksempel:

- Hvilke social responsibility elementer ser du på som viktig innen norsk torskeindustri nå og i fremtiden?
- Hvilke social responsibility elementer føler du er viktig for forbrukere, og ser du på noen elementer som mer salgbare enn andre?
- Hvis du ser på hvitfiskmarkedet, hvem ser du på som konkurrentene og hvordan synes du norsk torskeindustri stiller seg i forhold til disse generelt og i lys av social responsibility?
- Kan du si noe i forhold til norsk torsk generelt på det danske markedet, og mer spesifikt om innkjøpere og kunders krav til social responsibility?

Ser frem til å høre fra deg!

Vennlig hilsen,
Morten Stange Bye

Appendix 2: Interview guide 1 – Lone Marie Eriksen

The aim of the interview.

The main reason for conducting this interview is to provide us with a first round of information about CSR issues that might be potentially important for Danish consumers. Moreover, the interview also provides an opportunity to gather information about how Danish consumers perceive Norwegian cod.

The specific expert to consult will be Lone Marie Eriksen in Fiskebranchens Oplysningsudvalg. This organization plans and executes different campaigns with the ultimate goal of increasing Danes' awareness and consumption of fish. Lone Marie Eriksen is the press contact for the “2 gange om ugen” campaign (www.2gangeomugen.dk). Before that she was employed at Food Marketing. Food Marketing is a Danish consulting company specializing on the food sector. For instance, they have done both market research and marketing campaigns for actors within the Danish fish industry the last few years (www.foodmarketing.dk). Lone Marie Eriksen was the coordinator of projects done for the fish industry. With this background in mind, it is likely that she can provide us with insights on Danes' thoughts about consumption of fish and their CSR needs.

Type of interview.

Since the aim of the interview is basically to retrieve facts about the Danish fish consumption, the proposed type of interview is standardized. According to Berg (2007), this type of interview is applicable when one has quite clear ideas about the things one want to uncover. Even though this type of interview is very formally structured, it will be kept open a possibility for asking additional questions during the interview. Additionally, it should also be possible to ask for further explanations on answers and statements if needed.

Due to the interview object's busy schedule and the time schedule of this project, it is not possible to make a face-to-face interview, which was initially planned. Instead, the plan is to conduct a telephone interview. Before the interview takes place, the interview object will receive the questions per e-mail. This is done in order to give her more time to reflect on the questions and consult various sources of information if she finds that necessary. After the interview object has prepared herself, the actual telephone interview will be conducted.

The questions.

The questions in this category should provide information about what factors affect, and factors that matter, for a Dane when he or she consumes fish.

- How would you describe the typical Danish fish consumption?
- What kind of factors are affecting Danish fish consumption?
- How could these factors be ranked in accordance to importance for consumption / buying behavior?
- Branding of the CSR issue concerning consumer's health has been successful (2gangeomugen). Do you know any other examples of branding of fish using CSR elements? How has the effect of such campaigns been?
- Which CSR issues do you believe are important for consumers of fish?
- Of the issues listed in question 5, which do you believe are required by the consumers?
- Of the issues listed in question 5, which do you believe are expected by the consumers?
- Of the issues listed in question 5, which do you believe are desired by the consumers?
- Compared to the general factors affecting fish consumption, how important do you consider the CSR issues to be in Danish fish consumption?
- How do you believe Danish consumers perceive Norwegian cod?
- Does the Danish consumer have a perception of Norwegian cod as being social responsible?
- How do you believe CSR would work as a branding element for fish in general?

Appendix 3: Interview guide 2 – Svein Hallbjørn Steien

The aim of the interview.

By conducting this interview we will get an overview of the CSR issues related to the Norwegian Cod value chain. The secondary data collected has provided us with some essential information about this value chain, but a more thorough investigation is needed to be able to see links between the present situation and the needs the consumers have. This will provide a starting point for further investigation of customer CSR needs and to compare the present situation in the industry with CSR needs.

In order to retrieve this information, it will be necessary to consult an expert on the Norwegian cod value chain.

The expert to consult will be Svein Hallbjørn Steien from “Innovation Norway” department for agri- and aqua-culture. Innovation Norway promotes nationwide industrial development profitable to both the business economy and Norway’s national economy, and helps release the potential of different districts and regions by contributing towards innovation, internationalisation and promotion (www.innovasjon Norge.no). One of the key areas in the marine department is “Marine value crating program” aiming to exploit the natural opportunities Norwegian seafood has to achieve long term market oriented strategies. Mr. Steien is Vice President/veterinarian AVSF with Innovation Norway. He has special expertise on fish diseases, aquaculture, seafood, veterinarian practice ([linkedin.com](https://www.linkedin.com/in/svein-hallbjørn-steien)). One of the main areas he has worked on recently is cod farming issues. He is also one of the key persons in developing the strategic plan 2010 - 2020 for Norwegian cod in cooperation with organizations such as NSEC.

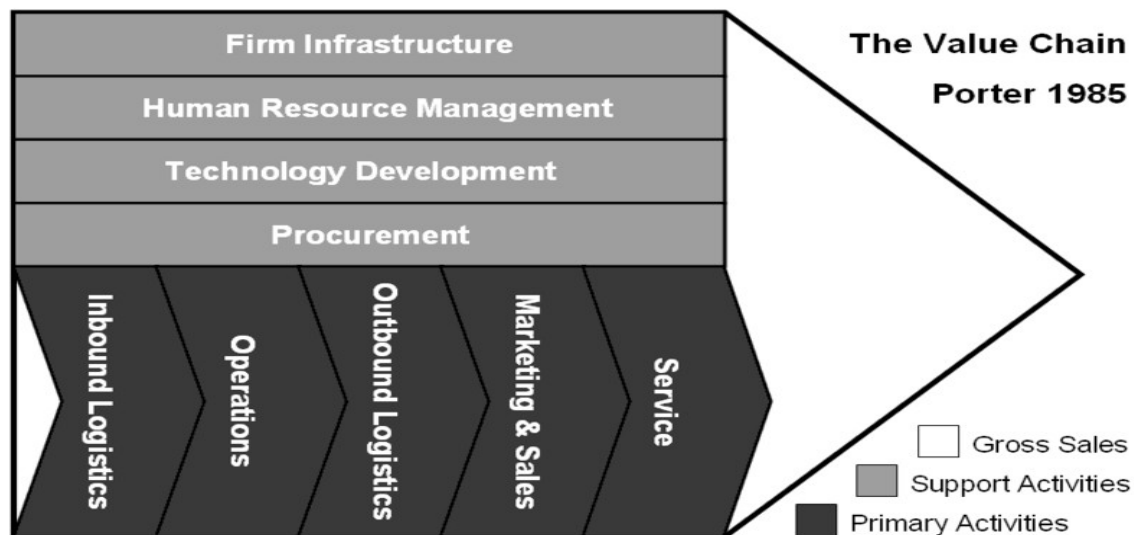
Type of interview.

The aim of the interview is to get a deeper understanding of the cod value chain, and will be conducted by confronting the interviewee with a picture of Porters (2006) CSR analysis of the value chain (fig. 1). As there is no overview of CSR issues in the cod value chain to be found, the information will be gathered through an exploratory conversation. This is done to include information not previously known to the interviewer. A set of key phrases for each block in the value chain will be created to have a start off point to the conversation if it stalls. As key elements are mentioned in the conversation, they are written down on the printed paper. This opens for both parts to return to already discussed issues and to discuss possible correlations between different areas. The conversation will be audiotaped to be able to have an accurate transcript.

The key phrases.

The key phrases constructed for this interview are based on Porters CSR analysis of the value chain (Fig. 1):

Fig. 1: The Value Chain (Porter, M. E., 1985)



The problem statement, research questions and secondary data give guidelines for value chain key phrases:

- Inbound logistic
 - Yngel,
- Operations
 - Fangsmetoder,
- Outbound logistics
 - Frakt (Kina)
- Marketing & Sales
 - Eksisterende brand strategi.
 - I hvilken grad er CSR ivaretatt.
 - Kundeorientering.
 - Helse
 - Ferdigprodukter – convenient
- Service
 - Oppfølging innkjøperne
 - Sporing
 - WEB
- Industry structure
 - Koordinert satsning på torsk (norsk fisk) Oppdrett. Innovasjon Norge.
 - Kvoter – konsesjoner – regulering (i CSR øyemed?)
- Procurement (taken care of)
- Existing strategy for Norwegian Cod
- CSR SWOT in each value chain area.
- Consumption buying behaviour – impression of customers needs

Om du kunne spurt en innkjøper av en stor dagligvare-kjede om deres holdning til CSR og torsk. Hva ville du fokusert på da?

Appendix 4: Interview guide 3 & 4 – Nicole Linde Jensen & Jesper Lehmann

The aim of the interview.

The interviews with the purchasers aim at further deepening the understanding of the CSR issues revealed in the two first interviews. More specifically, the purchaser interviews will try to retrieve information about the potential favorability of the CSR issues, and about the uniqueness potential of the issues. Favorability will be a question if a given CSR issue is desirable to consumers, and if it might be successfully delivered by the product (Keller, 2003, p.73). Uniqueness is concerned about mapping the *unique selling proposition* potential of a given CSR issue. It will be a question of whether a CSR issue is shared, or might be shared, with competing brands (Keller, 2003, p. 74). Additionally, it will also be an aim of the interviews to uncover potential new CSR issues to brand, discuss the purchasers role as gatekeepers to the consumers and to get some more input on how Norwegian cod is perceived by the Danes.

The specific experts to consult will be Nicole Linde Jensen and Jesper Lehmann. Nicole Linde Jensen is in charge of the fish purchase division at Coop Trading. Coop Trading is the internordic procurement company for Coop in Denmark, Norway, Sweden and Finland (www.cooptrading.com). Jesper Lehmann is sales director at Boutique Fisk. Boutique Fisk is a small chain consisting of three stores situated at Frederiksberg, Magasin and Lyngby (www.boutiquefisk.dk). With Linde Jensen and Lehmann's positions in mind, they should be able to provide us with valuable information on the issues discussed. Moreover, interviewing representatives for the two companies implies that a wide specter of store concepts and customers are covered; from the low-priced Fakta to the more expensive and exclusive store of Magasin.

Type of interview.

The proposed type of interview will be of a semi-standardized kind. Before these interviews are conducted we are already provided by a list of potentially important CSR issues. As stated in the previous section the aim of the interview is to provide us with some deeper understanding of the CSR issues. The four aims of the interview presented above, will form the main question categories. Within each category questions, more specific questions are asked in order to cover the topic and relate it to theory. However, it also opened up for a more loose and flexible discussion wherever it might be natural to do so. To open up for a more open discussion enables us to retrieve possibly valuable information not covered by the already existing guiding questions.

The interviews will be conducted at the offices of Nicole and Jesper respectively. Both of the authors of this paper will be present. One will be in charge of working through the questionnaire and asking the questions, while the other one will make notes and provide comments and additional questions if necessary. The whole interview section will also be audio taped in order to make the analysis process as detailed and thorough as possible. Before the interviews are conducted, the questionnaires will be sent to the interviewees. This will be necessary in order to give them a chance to prepare themselves, and thereby provide us with more accurate answers.

The Purchasers: their role as gatekeepers.

1. How would you describe your role as a gatekeeper to the consumers?
2. How does your role (as a gatekeeper), and the knowledge you have about the consumers and consumer trends, influence your role and power towards the suppliers?

The consumers: Mapping favorability.

1. How would you describe the consumers' purchasing process when buying fish?
2. As a deciding factor in the consumer purchasing process *of fish*, how would you describe the role and importance of social responsibility *today*? (Products signaling social responsibility)
3. Do you have any examples of any *fish products* successfully using social responsibility as a selling argument / branding element?
4. As a deciding factor in the consumer purchasing process, how would you describe the role and importance of social responsibility *in the future*? (Products signaling social responsibility)
5. Compared to more traditional marketing initiatives (such as price, quality, recipe suggestions etc.), how important do you consider the social responsibility / signaling social responsibility to be?

The suppliers: Mapping uniqueness.

1. How important do you believe it is for suppliers of fish products to be and to signal social responsibility *today*?
2. How important do you believe it will be for suppliers of fish products to be and to signal social responsibility *in the future*? Please define your timeline if possible.

3. What are the important and common social responsibility issues for suppliers of fish products to communicate *today*?
4. What do you believe will be important and common social responsibility issues for suppliers of fish products to communicate *in the future*? Please define your timeline if possible.
5. How would you rank the social responsibility issues mentioned in question 3 and 4 in terms of their potential to be a deciding factor in a consumer purchasing process?
6. What are the common *ways / methods* (e.g. labels, information on packaging and direct dialogue) for suppliers of fish products to signal social responsibility towards *consumers* today?
7. What are the common *ways / methods* (e.g. labels, information on packaging and direct dialogue) for suppliers of fish products to signal social responsibility towards *purchasers* today?
8. How would you as a purchaser prefer the supplier to consider social responsibility? What should the focus be and at what degree and in which form should it be communicated?

Norwegian cod: How Danes perceive it.

1. In general, how do you think Norwegian cod is perceived by *consumers*?
2. In general, how is Norwegian cod perceived by *purchasers*?
3. What do you and the consumers see as important attributes of Norwegian cod?
4. How would you say Norwegian cod is being perceived in terms of social responsibility?
5. Does this perception increase the willingness to pay for Norwegian cod?
6. Do you see any particular challenges and opportunities for Norwegian cod in the Danish market?
7. Can you describe your suppliers of Norwegian cod? How much do they focus on social responsibility in their sales and is there room for improvements?
8. Do you consider the efforts of the Norwegian Seafood Export Council to positively influence you as a purchaser and the customers' attitude towards Norwegian fish and cod in special?

Appendix 5: Interview guide 5 – Espen Tind Nordberg

The aim of the interview.

This interview aims at further deepening the understanding of how CSR work as a factor in the consumer buying process of fish. From the previous interviews conducted in this research, some important findings have occurred. Firstly, various it has been claimed that CSR is at the present time not an important and deciding factor when consumers buy fish. It is estimated that five to ten years are needed in order for CSR to reach its potential. Secondly, indications that Non-profit Organizations (NGO) have a potential of being a source of influence, on both consumers and suppliers of fish, have also been found. This justifies, and makes it interesting, to take a closer look at such organizations. Given their special position, they might have valuable insights on important social responsibility issues within fishery. Together with the fact that they can constitute a source of influence, that might deepen the discussion of what CSR issues NSEC should adopt in their branding strategy.

The specific expert to consult in this interview will be Espen Tind Nordberg of World Wildlife Foundation in Denmark (WWF). He is the program coordinator in the department of sustainable consumption. That should make it likely that he is able to give us some valuable inputs in our research. However, it has to be acknowledged that approaching WWF for information about CSR issues related to fish, puts some limitations on what we might expect to find. Since WWF is an organization concerned about environmental and nature-related issues, we might expect these to be their main focus.

Type of interview.

As mentioned before, the aim of the interview is to further explore some indications previous interviews have given us. They will thus form the basis for the questions.

Due to the interview object's busy schedule, it is not possible to make a face-to-face interview, which was initially planned. As wished by the interviewee, a set of questions will be sent to him which he is to give written answers to. Additionally, it is opened up for the possibility of contacting mister Nordberg again if clarifications concerning the first round of questions are needed, or if new questions arise.

The following questions will be sent to Espen Tind Nordberg, program coordinator in the department of sustainable consumption:

1. How would you describe your role and power to influence consumers of fish, purchasers of fish (purchasers = Danish grocery chains like Coop, Dansk Supermarked etc.) and suppliers of fish (suppliers = fishery companies selling and delivering fish to the purchasers)?
2. Concerning fishery *today*, what issues related to social responsibility do you consider being important?
3. Concerning fishery *in the future*, what issues related to social responsibility do you think will become important? If possible, please indicate when in time you believe the issues will become important.
4. What role do you believe social responsibility play in consumption of fish today?
5. What role do you believe social responsibility will play in consumption of fish in the future?
6. In terms of social responsibility, how do you perceive Norwegian cod?

Appendix 6: Interview guide 6 – Morten Hyldborg Jensen

The aim of the interview.

By conducting this interview we will get an overview how a producer of Norwegian cod thinks about the value chain and the dynamics of it in concern of social responsibility. The literature review collected has provided some essential information about this value chain, but a more thorough investigation is needed to be able to see links between the present situation and the needs the consumers have. This will provide a starting point for further investigation of customer's social responsibility needs and to compare the present situation in the industry with these needs. These needs are then becoming an attribute which might influence the consumer and can be exploited through strategic branding management.

In order to retrieve this information, it will be necessary to consult an 'insider' of the Norwegian cod value chain. The best suited expert of this category would ideally come from a company controlling as much of the value chain as possible. By this it is possible to get information based on the totality of the export cod industry.

Aker Seafoods is a perfect example of such a producer, as it is integrated in large parts of the value chain, from catch to production and sales. They also control a producer and distributor in Denmark, called Thorfisk (Akerseafoods.com). The expert in this case will be the Executive Vice President Sales & Marketing in Aker Seafoods, Morten Hyldborg Jensen. Jensen has been employed in Aker Seafood since 2002, and previous to that an eight year period in Stolt Sea Farm as SVP Sales & Marketing (Linkedin.com) <http://www.linkedin.com/pub/morten-hyldborg-jensen/10/a10/b99>

He is educated within international marketing, and has additional experience from the industry as sales director in Denmark, UK and Germany. He also holds position as chairman in Aker Seafoods Denmark, Aker Seafoods France (Akerseafoods.no) <http://www.akerseafoods.com/text.cfm?id=1-0&path=4,43> , and additional positions in the boards of FHL (fhl.no) <http://www.fhl.no/styret/styrets-medlemmer-article3046-68.html>,

Type of interview.

The aim of the interview is to get a deeper understanding around the sub questions created in the problem formulation. To have a as open conversation with the interviewee, very general

questions were made as an introduction to Mr. Jensen. These questions are e-mailed a week in front of the interview, to leave time both for reflection and for questions if there are any. A small introduction to the thesis theme and the following questions were sent in front of the interview:

”Which social responsibility elements do you see as important to the Norwegian cod industry now and in the future?”

- Which social responsibility elements do you feel are important to consumers, and do you view some elements to be more applicable as sales points than others?”

- “Looking at the whitefish market, who do you view as competitors and how do you feel the Norwegian cod industry relates to these in general and in light of social responsibility?”

- “Can you please reflect upon Norwegian cod in general in the Danish market, and more specifically customers and purchasers needs of social responsibility?”

This then is a semi structured interview, and it is up to the interviewers and the interviewee to lead the discussions around the given questions in an exploratory way of conversation. This is done to also include information not previously known to the interviewer. The conversation will be audiotaped if the interviewee allows this.

Appendix 7: Minutes interview 1 – Lone Marie Eriksen

Presentation of findings and analysis of interview 2.

In the following the findings and discussion of interview 2 will be presented. Firstly, the findings concerning CSR will be presented and discussed. Thereafter, the findings concerning Danes' perception of Norwegian cod will be presented and discussed.

As stated in the interview guide of interview 2, the main objective was to gather a first round of information regarding CSR that might be important to Danish consumers of fish. To display the findings, Porter's Value Chain (2006) will be applied. This will work as a good tool to show where in the Value Chain CSR issues are to be found. Also it is a good way to quantify the findings, which opens up for the possibility to demonstrate magnitude and show patterns in the messages.

The Value Chain and findings from the interview:

The Support Activities:				
No specific CSR issues concerning the support activities were identified.				
Inbound Logistics: - CO2 Emissions, the case of processing fish in China (page 3)	Operations: - Growing focus on MSC and the example of Royal Greenland trying to achieve MSC labels on a range of products (page 2) - <i>5% of Danes believe sustainable fishery is important, but the number will increase in the future (page 4)</i> - MSC has the potential to be a	Outbound Logistics: - CO2 Emissions, the case of processing fish in China (page 3)	Marketing and Sales: - Health as a CSR issue, and the case of it being a common fact among Danish fish consumers (page 2) - MSC has the potential to be a deciding factor when two equal fish products are displayed (page 4) - CSR has a potential of being a profitable branding element (page 4)	Service: - no specific CSR issues concerning service were identified
General CSR Findings:				
- Denmark is not in the driver seat concerning adoption of CSR trends (page 2) - The role and influence of environmental organizations (page 2) - The purchasers as gatekeepers (page 2) - The future potential of CSR issues as an element guiding fish consumption (page 4)				

CSR: Findings and discussion.

In general the interview revealed a lot of interesting views and thoughts on CSR-related issues that needs to be investigated further. First of all, it backs up the academic discussion of CSR being a vital part of focus for the 21st century firm. Several times Lone Marie Eriksen mentioned the growing importance of CSR and the branding opportunity it constitutes. In terms of the interviewee's professional background, it brings practical support to the theoretical and academic arguments.

The interview identified several examples of possibly important CSR issues, scattered throughout the most of the value chain. The only exceptions were that there were no CSR issues identified in the service activities or in the support activities. However, this does not mean that these activities should be focused less on in the coming rounds of interviews. They still might have important CSR issues related to them.

The Marine Stewardship Council label (MSC), and how it signals sustainable fishery, was in particular mentioned by the interviewee. It is viewed by her as something that might have a effect in purchase situations. For example she stated that "...if two identical fish products were displayed next to each other, and one of them was carrying the MSC label, this label is likely to prove to be the factor making the consumer choose that specific fish". The growing importance of the MSC label was further backed up by the example the interviewee mentioned about Royal Greenland. This Danish fishery company are working to MSC label all of their pelagic fish products. They even have got the label on their canned cod roe.

The issue of transportation, and the CO₂ emissions it leads to, was also brought up by the interviewee as an issue consumers might consider important. As an example she mentioned how a lot of fish might be caught in European waters and then shipped to China for further processing due to the relatively low cost level found there. After the processing the fish is shipped back to Europe to be sold on the end-markets there. As the society is becoming more and more aware of the consequences the transportation has on the global warming, the interviewee believes that this will have an affect on consumers' buying behavior. She states that she thinks fish caught and processed locally will be preferred over the "long distance" fish due to the contribution of lowering the CO₂ emissions.

A third issue the interviewee mentions as a possibly important one, is the one related to international fishery regulations. The fishery today are controlled by several legal regulations in order to prevent overuse of the resources. For instance, the fishery is regulated through quotas. Moreover, there are also regulations concerning the trawls used to catch fish. They should be designed so that they only capture the fish types there are supposed to capture, and also so that they do not impose and harm or destruction in the eco systems where they are used. Today such regulations are not very well known to the average consumer, but informational campaigns can easily change this picture.

Finally, the interview revealed some very interesting information about the roles of the grocery chains / purchasers and the environmental organizations. The interviewee argues that the environmental organizations are constantly performing activities aiming at informing and affecting the behavior of both consumers and purchasers. They are able to educate the consumers so they become more socially responsible. Consequently, and together with active dialogue with purchasing organizations, this enables the environmental organizations to direct the behavior of the purchasers. In order not to suffer any loss of sales, which consumer campaigns might lead to, the purchasers might take action towards their suppliers so they fulfill the demands of the environmental organizations and the consumers. Such activities prove the prior argument that purchasers are important gatekeepers. They know the consumers and their demands, and are also at the same time able to affect the suppliers. As a consequence, they should be a valuable source of information about the consumers' CSR needs. Also, environmental organizations have now been revealed as a potentially valuable source of consumer information.

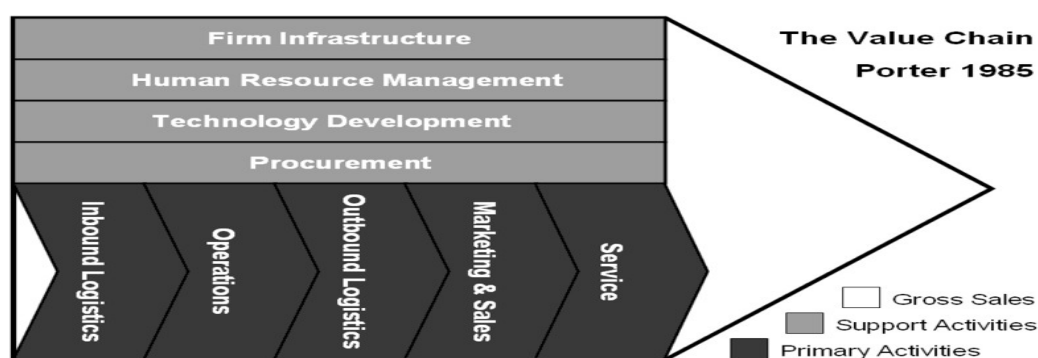
To sum up the findings concerning CSR, many of the indications we have got in this interview need to be further investigated in coming rounds of interviews. For instance, more information is needed on possible effects of branding of MSC, CO₂ emissions and fishery regulations. Additionally, the role of environmental organizations as educators should deserve a more central focus.

Danish perception of Norwegian cod: Findings and discussion.

Concerning this issue, the interviewee states that she does not believe Danes have a special impression of Norwegian cod, or differentiate it in any way compared to other types of cod. She says that Danish consumers consider cod to be cod, no matter place of origin. She also

reveals something that might indicate that this is not a special case only for cod. She brings up the example of salmon as well, and states that Danes also perceive salmon as salmon, no matter place of origin. For the coming rounds of interviews, the findings imply that it is necessary get new views on the Danes' perception of Norwegian.

Appendix 8: Minutes interview 2 – Svein Halbjørn Steien



The Value Chain (Porter, M.E., 1985)

- Industry infrastructure

The industry infrastructure in Norwegian cod production is according to Sveien influenced by the fact that it is only possible to catch and breed north of “Stadtlandet”. This is because the waters south of this latitude have a temperature which increases the chances for diseases spreading in the stock. Wild stocks are mainly found in “Lofoten” in the northern part of Norway. There are governmental licensees to be allowed to catch from the wild stock and to produce farmed cod. The government has provided 430 licenses for cod aquaculture. Only 170 have started production, and 20 of these stands for 80% of the production. In spite of not being a tradable resource, there are licensees which trade it by bending the rules.

Sveien points out that there is strict business conditions to the cod producers set from the government. There is a quality evaluation for each spot of aquaculture to avoid having production sites which have a threat of disease development and high risk of fish escaping. These are also limitations of how big an aquaculture location can be. This is to avoid extensive contamination if a disease breaks out.

To control the fish stock level in the wild-catch part of the industry, there is a law against “dumping” any caught fish back into the sea. Some catching methods, such as trawling, catch other fish than the intended one. Reporting total catch helps estimating stock levels for all types of fish, and is the basis of how strict regulation should be for the coming season.

- Human Resource Management

The industry is historically based “on one man” companies and working conditions has always been challenging and dangerous. This is changing and companies now run whole fleets. According to Sveien there are some troubles in recruitment to the industry, especially with people with economical education. This influence the way the product is sold and how it is exploited commercially.

- Technology Development

Sveien tells a story where Norway has been in the front seat of development of cod aquaculture. It goes all way the back to 1872 when the first attempts to keep cod in captivity was made. It is only during the last decade or so that cod aquaculture has counted as a commercial contributor to the industry. So far, the quality of the fry has been of somewhat low quality and has not resulted in cod in the range of 1-2 kg. The new generation of develop fry will result in 3+ kg, which is more in range as wild caught cod. This generation of fry will reach the market during 2012. 5 years ago 20% of the aquaculture cod was disfigured, and 10 – 20% of the fish was of very poor quality. Now these categories amount to approximately 0.05%.

The environment for R&D in the Norwegian cod industry is of very high quality. About 500 persons are involved and the continuity is good. This includes people with commercial and research background, working toward a common goal of creating a sustainable and as natural product as possible. This leads to a very high knowledge and experience level, which possibly can create a competitive industry.

- Procurement and Inbound Logistics

The fry used in cod aquaculture is produced locally in Norway. This results in low transportation distance to the fish farm sites. However, the fish farmers are according to Sveien in general bad at planning and take high risks. Each licensee is usually dependent in only one site, thereby the risk of one seasons failure will result in bankruptcy is high. In the wild catch part of the industry the natural resources are very time limited. The stock which provides the largest numbers of caught cod is the North Atlantic stock. The catch season has it peak in March when the “Skrei” (a stock type within the cod family) arrive “Lofoten” to spawn.

- Operations

In aquaculture there is high risk in connection with escaped fish. If this is the case a whole income year is ruined. To help prevent such incidences IN yearly support the industry with 110 mill. NOK. They are restrictive of who they support and look for companies which can show professionalism throughout the value chain. Yearly approximately 26% of farmed cod escapes or are not adequate as food. This number is decreasing yearly as improved measures to keep the fish farms intact are made. A yearly governmental inspection of the sites is made. In addition, each licensee must turn in a monthly report to the Department of Fishery. This report must contain any escape of cod, diseases among the crop etc.

It has been a great focus to exploit the whole fish in production. New products within pharmacy have for instance been developed. Omega-3 oil from the cod liver has turned into an industry in itself.

Combined, the cod industry and aquaculture industry can soon produce cod around the year and give a stable supply of cod.

MSC is seen as becoming a standard. The regulations set by MSC are something all producers must follow to be eligible to supply the market. There is a challenge to such brands, as there are so many of them and the consumer seems confused and often choose to ignore them. A new standard is, according to Sveien, to overtake the MSC position is under development by the WWF and Marine Harvest (Norway based company and one of the largest producers of fish in the world).

Norway has been pushing new laws through, setting a standard also for the EU when it comes to illegal fisheries. This has been reduced to a great extent. The next step for Norwegian officials, which is a standard in Norwegian waters and about to become a rule for EU fisheries as well, is to prohibit throwing unwanted fish back into the sea. All fish should be landed and accounted for, this to keep track of resources and to better regulate the industry.

One example of criteria from the NGO and purchasers is to have a humane way of slaughtering the fish. A new regulation set a maximum of 15 seconds to “plug” the fish (kill the fish by inserting pointy object into the brain). This set harsh limitation in the rate of fish caught each boat can capture simultaneously.

- Outbound Logistics

The last years the Norwegian providers of cod has had a change in stock responsibility of whole cod. There has been a shift where the buyers abroad leave the stock responsibility and risk to the Norwegian suppliers/producers. This has increased the cost and challenge the amount of fish caught at once from.

As salmon is a big export commodity, there is a great opportunity to exploit large scale business. However, this is not done sufficiently yet.

- Marketing & Sales

The Norwegian cod industry has up to now had a focus on R&D and production. Only the market for dried and salted cod has old and strong traditions and a unique position in the “bacalao” market. In the fresh and frozen cod market there has been strong focus on loins and whole fish. With many small suppliers the bargaining power often is on the buyer’s side. However, to create a bigger demand, the biggest challenge is to get fish back on the table as a more common source of food. Customers eat too little fish. The effort from NSEC, with a generic marketing strategy for the cod industry as a whole, is according to Sveien no longer working properly. It should be restructured to take care of the opportunities each production form has.

It is clear that, due to the focus on R&D and production, little has been done to see the demand in the market and to adjust the production to cover these.

The consumers have big trust in the purchasers, and tend to feel it’s the stores responsibility to offer fish from producers that show good social responsibility.

Sveien think that the purchasers have a minimum knowledge about how operations work, and seem to put great trust into reports and suggested demands from NGO’s. Further, he thinks they have a bigger influence on the purchasers than the purchasers themselves recognize.

In Sveien’s mind the number one priority of social responsibility, from a consumer’s perspective, is sustainability on an external level and health issues individually. But he emphasize that these variables must always be put into equation with price.

- Service

As a after sale service, the large grocery chains seem to look for traceability of where and when the fish has been caught. This gives the customers the opportunity to see for themselves the details around the bought product, and to form their own opinion of product quality.

Another service Norwegian fish industry is doing well is to make PR stunts which show potential customers and gateway keepers the history, catching methods and such. Sveien is more critical of how they lack experience and knowledge of how to exploit these efforts and turn them into sales.

External:

The NGO’s influences the customer. The customers trust the NGO and tend to listen to their advice of how to make an impact to a better world.

Norway has good reputation in concern of social responsibility.

Appendix 9: Minutes interview 3 – Nicole Linde Jensen

The purchasers: their role as gatekeepers to the consumers.

Coop's role as a gatekeeper is described by the interviewee to be a two-sided case. Coop tries to offer what the consumers want, but at the same time the consumers are bound to buy from the selection of goods offered. Concerning how Coop's role towards the suppliers is influenced by the knowledge they have about consumers, she mentions that variables deciding if a product is taken into the store or not are, amongst others, the following: firstly, product quality. She exemplifies with the fact that consumer do not want fish containing bones. Logistics is the other thing she mentions as an important variable. That is related to the demand from consumers that the fish shall be fresh. Consequently, it is expected that the suppliers deliver excellent transportation service.

The consumers: mapping favorability.

On the first issues discussed, consumer's purchasing process when buying fish, the interviewee describes fish as a product with a somewhat higher involvement than regular grocery commodities. This is so because fish is usually the main ingredient in main dishes such as dinner. Moreover, the interviewee states that consumers buying fish can be of two kind. Firstly, one has the "*the last minute decision makers*". They decide what to get once they are in the store. The other group is labeled "*the kid family*". This group has a plan when entering the store, and is, due to children involved, particularly concerned about health issues. CSR is not mentioned when the interviewee describes the consumer purchasing process. She says it is not important at the present time. It is discussed internally and with suppliers, but it is still not an issues concerning the consumers. She exemplifies by stating that the MSC label is not known by consumers yet. Moreover, she also states that sustainability as a deciding factor in a purchase situation is more important than price and quality for only a very small segment. Also, she argues that there is a mismatch between what consumers intend to do and what they actually do. The consumers give an impression of wanting to prefer socially responsible products, but do not follow through in real life.

When asked about the future perspective of CSR as a branding element, the interviewee becomes much more optimistic. She is certain it will become important, but not for some years. She believes that in 5 to 10 years CSR will start reaching its potential as a branding element. More specifically, Nicole Linde Jensen thinks that ecology, the MSC label and environmentally friendly products will be important. She also mentions origin as a factor related to social

responsibility. That is because origin brings up associations to social responsibility. In relation to this, the interviewee brings up that she thinks “*there is room for the good story*”. If a product is able to tell a story, for example about its origin, she thinks it will become more appealing to the consumers.

The suppliers: mapping uniqueness.

As for the consumers, the interviewee believes it is not very important for suppliers either to be or to signal social responsibility today. However, there is a shift in that trend, as exemplified by the MSC standard, and the fact that the issue is discussed with suppliers. It is expected that this trend will keep on evolving in the future. When asked about what she thinks will be important and common social responsibility issues for suppliers in the future, the following is what the interviewee mentions: Danish labor protection, sustainability, origin, production conditions, company reputation, cultural consideration and fertility. Danish labor protection means supporting Danish companies and labor by purchasing their products. Moreover, the interviewee also claims that consumers do not expect the purchasers to take responsibility for social responsibility issues. Society is more individualistic and the consumers themselves want to take responsibility for these issues.

When asked about how she prefers a supplier to consider social responsibility, Nicole Linde Jensen wants the supplier to have a healthy economy, sustainable production, care about recycling, use electricity in an efficient and effective way and optimizing their logistic routines in order to minimize CO₂ emissions. She believes that if two suppliers offer the same products, social responsibility can become the deciding factor for who they will choose.

Norwegian cod: how Danes perceive it.

Norwegian cod does not, according to Nicole Linde Jensen, have a specific image in Denmark. At best it can be considered to be Scandinavian. Danes more or less treat cod as cod, no matter where it comes from. Accordingly, she believes that there is a job for Norway to do in order to increase the awareness of Norwegian cod. Finally, she mentions that there is a potential for cod products in general to be differentiated better.

Appendix 10: Minutes interview 4 – Jesper Lehmann

All customers would like to have social responsible fish, but few actually care about it when buying. To have them consider this aspect it is necessary to educate the customer, they do not come voluntarily for information. He expressed the task of making customers today seriously consider social responsible aspect as “an impossible battle to win”. There are also many are biased when it comes to fish. No matter what, they have the impression that “the fish is old”.

Their main segment is described as a young family consisting of a couple aged 30 with kid/s. Their reference is convenience and health. The segment of the common fishmonger normally is based on a segment based on people aged 60+. This generation has a different attitude toward fish and has specific preferences in how to prepare the fish, such as boiled cod. There were 1100 fishmongers in Denmark in 1970, in 2006 there were 100.

As a distributor, “Fisk Botique” does not influence the suppliers in terms of demands of social responsible fish. The segment is too small to fill a sufficient demand for change in the portfolio of social responsible fish. He predicts that in 5 years there is a better chance that there is a sufficient need in the market for social responsibility. In the meantime the customers must be educated to understand what this social responsibility involves.

The majority of customers want to buy salmon. This stands for around half of the sales. 10% of the customers have special interest and know exactly what they want. Many of them are interested in ecological salmon, and the important thing in this product category is the fodder and the living conditions the fish has. Some are particular of land of origin and avoid farmed fish from African countries, as the living conditions there supposedly are bad.

Cod is connected to traditional New Year’s dinner. This is the only known way to prepare cod in consumers mind. They have introduced new ways of preparing cod through their “make food” products. Then the food is made ready in the oven. This has been well received from the younger segment, while the 60+ segment have responded negatively.

The fishmonger does not know about the MSC brand. He knows about one attempt of branding fish. This is the smoked, ecological salmon under the brand “We Care”.

In the future Jesper sees those social responsibility issues playing the most important role as being wild caught, being ecological and being as natural as possible.

According to him no customers recognise Norwegian cod as being anything special. There is only cod, no origin can be specially considered. This is the case for purchasers as well. However, later in the conversation he does emphasize that Icelandic cod represent “super fresh”. Nordic fish is reckoned to be safe and ok to the consumers, as the fish is from cold and clear waters.

He is fairly positive to Pangasius, especially in concern to price. However, he does stress that the price is not as cheap as it seems. There is a thin frozen water glazing around the Pangasius, which raises the actual price. According to Jesper, the first marketing campaign which tells they are superior to the other whitefish will establish a position which cannot be reversed. In his mind Pangasius can only compete on price.

Jesper stress that included in quality is also the history behind the product, which includes social responsible variables. Price will still be the most important variable.

Appendix 11: Minutes interview 5 – Espen Tind Nordberg

In the following Espen Tind Nordberg's, program coordinator in the department of sustainable consumption, answers to the questions about social responsibility within fishery are presented.

- 7. How would you describe your role and power to influence consumers of fish, purchasers of fish (purchasers = Danish grocery chains like Coop, Dansk Supermarked etc.) and suppliers of fish (suppliers = fishery companies selling and delivering fish to the purchasers)?**
 - a. Ultimately it is the ambition of WWF to influence the way natural resources are harvested and exploited. Our mission is to stop degradation of biodiversity and to minimize the total pressure (footprint) on the Planet. The ways of doing this is to influence regulation (governments) and / or to influence value chains (private sector). Citizens are means to influence both the politicians (as voters) and private enterprises (as consumers)
- 8. Concerning fishery *today*, what issues related to social responsibility do you consider being important?**
 - a. The long term sustainability of the marine resource and protection of ecosystem functions and values
- 9. Concerning fishery *in the future*, what issues related to social responsibility do you think will become important? If possible, please indicate when in time you believe the issues will become important.**
 - a. The same as now, but also the catch sectors role in terms of Co2 emissions. It will also become relevant to regard the harvest and production of fish in terms of a global protein issue. It will become an issue to distribute the wealth of the planet more equally among the global citizens. In 2050 it is estimated that there will be 9 billion people on the planet.
- 10. What role do you believe social responsibility play in consumption of fish today?**
 - a. Consumers expect seafood to be a sustainable and legal source of protein
- 11. What role do you believe social responsibility will play in consumption of fish in the future?**
 - a. See answer 3a
- 12. In terms of social responsibility, how do you perceive Norwegian cod?**

- a. Norwegian cod??? What stocks are you referring to? Coastal / Arctic? Many Norwegian fisheries are at present getting certified according to the MSC standard. MSC is the best certification program for seafood at present so that indicates a good level of environmental sustainability.

Appendix 12: Minutes interview 6 – Morten Hyldborg Jensen

The interview was not audiotaped after wish of the interviewee. The following is based on notes made by the interviewers.

To Aker Seafood important social responsibility elements today are divided in 3:

1. Social responsible economic – meaning keeping habitation spread geographically in Norway, and by being responsible for providing job opportunities for people in the more remote areas.
2. Biological social responsibility – meaning the work done to keep the fish stocks sustainable. In Norway this means quotas through a governmental management of the sea resources. Norwegian sea management is recognized as the best in the world by (Canadian university)
3. Environmental social responsibility – Especially important is the carbon footprint. These are focused upon in connection with investments in fishing vessels using less diesel fuel, emphasizing on short travelled food and using shipping or trains as transportation instead of flights and trucks.

MSC

There is one key element in the social responsibility area for Aker Seafoods. This is to get the arctic cod MSC labelled. Presently cod as a specie can not achieve MSC label as a sustainable stock, as there the label does not recognize the internal difference in the stock. This means that Atlantic cod presently can not be MSC certified because it is considered to be endangered.

MSC is a label Aker Seafood wants to use actively on all products as this is a demand from the gatekeepers, the purchasers. The effect as a branding element toward the consumers is not seen as important. In the UK, a frontrunner concerning ethical consumption, the brand does not achieve more than 5% recognition among consumers. MSC is therefore a trade brand used in branding activities towards retailers / purchasers, and not towards end-consumers. The MSC organisation is largely represented by scientists and work in an academic manner. It is in Aker Seafoods mind important that the organisation also recognize the industry and marketing personnel in their work. An example of the importance of MSC is found in contracts made on the Danish market. As the cod used in some of their products were not certified, they had to change the ingredients with Alaska Pollock.

Aker Seafood attitude to MSC is that this shall be the brand to use and should be supported by all stakeholders. It is no need to come up with new alternatives; especially a Nordic brand seems out of the questions. MSC represent a third party, being objective. This is essential. Another reason for not introducing new social responsibility brands is because it might result in an inflation of brands. This is in turn might have consequences for consumers who might find it hard and confusing to keep track on all the different brands. The result could be that they ignore all brands, and thereby reducing the effect and meaning of the brands. The interviewee referred to the possible consumer scenario as a matter of cognitive dissonance.

Another issue concerning brands or labels is the issue of having an independent third party being responsible for the brand / label. This ensures that the brand has a high degree of credibility. Jensen exemplifies by saying that NSEC wants to develop their own social responsibility brand. This is not a good idea because they would be sitting at both ends of the table as they will give approval to products they also have an interest in selling.

NGOs & media

The most important NGO in the region, and the world, is WWF. They have extreme power and impact. As an example of the NGO's power is Lidl's (Germany) purchaser's use of Greenpeace's rating of grocery chains selling fish from sustainable fish stocks. Their aim is to top this list. Moreover they also put great emphasize on WWF's green-yellow-red light chart, and use it as a decision variable when purchasing fish. They claim that if they break some of the guidelines of the chart they might end up getting really bad publicity in the media. This might trigger a snowball effect where also the fishery companies might get bad publicity. For Aker Seafoods it is important to cooperate with the NGOs. This is to understand each other and to work out things in the best interest of both parties and to learn from each others. The media are very interested in the NGOs' work, and print all negative stories they come with. Positive stories sell less. This is in Jensen's mind due to the tabloid tendencies in the media.

Norway and SR

The Norwegian governmental management of sea resources are world known. They go back to 1937 when the first laws were made ensuring sustainability as a rule of thumb for all involved stakeholders. Norway has a strong fish industry history.

Catching gear

Aker Seafood is looking into alternative fishing gear usage. This is to prepare for any discussion with NGOs, and to have scientific research available for such a reply. They do challenge the thoughts of trawls etc harming the environment as some NGOs claim. Jensen makes a comparison of our human influence on land as just as harmful. More specifically, he claims that when farmers cut down trees and other vegetation they are creating a "culture landscape" which is commonly accepted as a good thing. But when fishing vessels cut down vegetation in the sea it is considered to be an environmental crime. There are also indications that trawling gives less secondary catch (fish which is not included in the quota). He also claim that using line fishing can prove being less selective of the catch than trawling. Trawling is based on technology and experience of fishermen, selecting their catch carefully. In addition research on alternative catching methods is done for a economic reason. For instance pair-trawling and floating-trawling save 15% and 10% fuel respectfully. This results in a win-win situation.

Customer SR needs

Jensen thinks customers' needs concerning SR are few. They are mainly concerned about sustainability and perhaps the carbon footprint. In connection with the carbon footprint he emphasizes on farmed fish as being more environmentally friendly than other food sources. In Jensen's mind the important variables for farmed fish is the relatively low carbon footprint it leaves. In his mind Norwegian fish industry has the best story in the world to tell, and should do so proudly. Moreover, he also puts emphasize on the need for clear documentation of the effects of social responsibility efforts. For example he states that one has to have a very scientific approach when documenting and comparing CO₂ emissions. The scientific approach, with a lot of emphasize is necessary, in order to know if social responsibility efforts are worth engaging in. additionally, it is important to show that the company is able to "walk the talk".

Concerning general consumer behaviour, the most important when a customer is deciding their groceries are placement and facing. 70% of their purchases are done on impulse, not knowing what to get when entering the store. Jensen defines an impulse purchase as a purchase decision made in less than one minute. Point-of-sale campaigns are therefore extremely important.

Competition

It is important to see the SR of keeping the Vietnamese industry, as more than 200 000 people are dependent on it as their workplace. Sales prove that fresh cod is selling better than ever.

Frozen cod is however on a downturn. Concerning the frozen fish category, and in particular the frozen fish blocks, this is where the interviewee finds the threat from Pangasius being most severe. Customers are so far not too confident with the Pangasius. They are more familiar with cod, and consider it being a safer choice than Pangasius. Perhaps Pangasius is a everyday meal choice, as it is cheap. But when choosing a proper dinner, or when the economic situation for a person is good, cod is the choice. A positive thing about Pangasius is that if customers choose this, it will increase the recruitment for eating fish. This is very important. For cod it is more important to find new ways of delivering the product, such as convenient food etc. As long as the two fish types can compete on the same terms, he sees no problems. These terms are for instance that it is important that the Pangasius does not hold polyphosphate, increasing how much water the product can contain. Other things are that they shall not market themselves as omega-3 containing. Actually, Pangasius contains the healthier omega-6.

Norge – Seafood from Norway

The campaign from NSEC is very effective. In Sweden a 6 times increased sales was the result after the January campaign.

Danish market

The important aspect is to reach the category managers in the stores with a generic marketing plan, to ensure placement and facing, and also to sell in campaigns. Aker Seafoods sells several product types. In grocery chains it is mainly half fabrics such as fish cakes etc.

Appendix 13: Store Observations – Norwegian Cod, Alaska Pollock and

Pangasius, Alaska Pollock and Cod in Grocery Stores on The Danish Market							
Type	SHOP	PRODUCT TYPE	PRICE DKK/KG	PRODUCER NAME	WATERS ORIGIN	SR	WEB PAGE SR
Alaska Pollock	Superbrugsen, Nørrebrogade	Fish filet - Frozen	59,90	Royal Greenland	Pacific Ocean	MSC Label	Different SR concerns presented -
Alaska	Fakta, Nørrebrogade	Fish filet - Frozen	59,90	Queen's Ocean	Pacific Ocean	MSC Label	Web page not
Alaska Pollock	Irma, Illum	Fish filet - Frozen	100,00	Fregat	Pacific Ocean	MSC Label	More or less nothing about SR - only a declaration that all suppliers
Alaska Pollock	Føtex, Fredriksberg Center	Fish filet - Frozen	40,00	Emborg	Pacific Ocean	None	Sustainability, traceability and certification are
Cod	Superbrugsen, Nørrebrogade	Fish filet - Frozen	107,38	Coop - Private Label	North East Atlantic	None	An own page concerning SR -
Cod	Netto, Nørreport Station	Fish filet - Frozen	99,90	Aker Seafood	Barents Sea	None	State that their fishery activities are based on sustainability -
Cod	Irma, Illum	Fish filet - Fresh	192,00	Thorfisk/Aker Seafood	Barents Sea	"Fra Barentshavet", "Nøkkelhull", "2 gange om ugen"	State that their fishery activities are based on sustainability -
Pangasius	Superbrugsen, Nørrebrogade	Fish filet - Frozen	54,92	Coop - Private Label	Vietnam	None	An own page concerning SR -
Pangasius	Superbrugsen, Nørrebrogade	Fish filet - Frozen	88,73	Butler's Choice	Vietnam	Butler's Choice is a company with SR as a	SR is a core value and that is depicted in all
Pangasius	Irma City, Nørrebrogade	Fish filet - Frozen	88,33	Fregat	Vietnam	"2 gange om ugen"	More or less nothing about SR - only a declaration that all suppliers
Pangasius	Fakta, Nørrebrogade	Fish filet - Frozen	73,17	Butler's Choice	Vietnam	Butler's Choice is a company with SR as a	SR is a core value and that is depicted in all
Pangasius	Fakta, Nørrebrogade	Fish filet - Frozen	41,67	Queen's Ocean	Vietnam	"...sustainably	Web page not
Pangasius	Netto, Nørreport Station	Fish filet - Frozen	50,00	Nordic Seafood	Vietnam	None	Active listing of their MSC labeled products, Pangasius is not among these.
Pangasius	Irma, Illum	Fish filet - Frozen	83,33	Fregat	Vietnam	"2 gange om ugen"	More or less nothing about SR - only a declaration that all suppliers
Pangasius	Magasin	Fish filet - Frozen	64,95	Lilly	Vietnam	None	Web page not
Pangasius	Føtex, Fredriksberg Center	Fish filet - Frozen	59,95	Emborg	Vietnam	None	Sustainability, traceability and certification are

Main findings

Average price frozen Alaska pollock DKK	64,95
Price difference frozen DKK cod versus Alaska pollock	68,14 95 %
Observed Social Responsibility elements used: MSC (75% of the times)	
WEB-page Social Responsibility observations: Generally about sustainability.	
Average price frozen cod	133,09
Observed Social Responsibility elements used: "Twice a week", "From the Barents Seas", "Keyhole"	
WEB-page Social Responsibility observations: Coop state social responsibility, Sustainability fisheries.	
Average price frozen pangasius DKK	67,23
Price difference frozen cod versus pangasius	65,87 98 %
Observed Social Responsibility elements used: "Twice a week", "Sustainable bred", "Butler's Choice"	
WEB-page Social Responsibility observations: Butler's Choice use SR extensively. Health and sustainability	

Pangasius

Appendix 14: AC Nielsen Survey

Project Name : Global Omni 1h 2009 - SET 1 - TABLE 2 : ALL RESPONDENTS BY ALL COUNTRIES""

Job Number :ONL5617

17.apr.09

Table 32

Q18R4. How strongly do you agree or disagree with each of the following statements: (Global Environment)

(R4)I am concerned about overuse of global fish stocks

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Strongly agree (5)	17 %	15 %
Agree (4)	36 %	38 %
Neither agree nor disagree (3)	36 %	31 %
Disagree (2)	9 %	14 %
Strongly disagree (1)	2 %	2 %
Sum	100 %	100 %
Top 2 Box (NET)	53 %	53 %
Bottom 2 Box (NET)	11 %	16 %
Mean	3,6	3,5
S.D.	0,9	1

Project Name : Global Omni 1h 2009 - SET 1 - TABLE 2 : ALL RESPONDENTS BY ALL COUNTRIES""

Job Number :ONL5617

17.apr.09

Table 35

Q21. Which of the following groups should assume responsibility for ensuring the sea's fish stocks are not overused?

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Governments of countries	67 %	70 %
Non-governmental organisations (NGO's)	18 %	11 %
Retailers of fish products	16 %	8 %
Fish manufacturers and processors	28 %	20 %
The fishing industry	46 %	49 %
People who buy or eat fish	19 %	9 %
Sum	193 %	168 %

Q22. Have you eaten fish in the last year?

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Yes	92 %	97 %
No	8 %	3 %
Sum	100 %	100 %

Q23. Have you purchased fish in the last year?

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Yes	85 %	91 %
No	15 %	9 %
Sum	100 %	100 %

Q24R1. Do you prefer wild captured fish or farmed fish on...? - (R1)Taste

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Strongly prefer wild captured fish (5)	23 %	30 %
Prefer wild captured fish (4)	28 %	28 %
No preference for wild captured fish or farmed fish (3)	40 %	39 %
Prefer farmed fish (2)	6 %	2 %
Strongly prefer farmed fish (1)	2 %	1 %
Sum	100 %	100 %
Top 2 Box (NET)	52 %	58 %
Bottom 2 Box (NET)	9 %	3 %
Mean	3,6	3,8
S.D.	1	0,9

Q24R2. Do you prefer wild captured fish or farmed fish on...? - (R2)Nutritional content

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Strongly prefer wild captured fish (5)	21 %	24 %
Prefer wild captured fish (4)	26 %	25 %
No preference for wild captured fish or farmed fish (3)	44 %	45 %
Prefer farmed fish (2)	7 %	3 %
Strongly prefer farmed fish (1)	3 %	2 %
Sum	100 %	100 %
Top 2 Box (NET)	46 %	49 %
Bottom 2 Box (NET)	10 %	6 %
Mean	3,5	3,6
S.D.	1	1

Project Name : Global Omni 1h 2009 - SET 1 - TABLE 2 : ALL RESPONDENTS BY ALL COUNTRIES""

Job Number :ONL5617

17.apr.09

Table 41

Q24R3. Do you prefer wild captured fish or farmed fish on....? - (R3)The environment

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Strongly prefer wild captured fish (5)	17 %	25 %
Prefer wild captured fish (4)	21 %	22 %
No preference for wild captured fish or farmed fish (3)	41 %	40 %
Prefer farmed fish (2)	15 %	9 %
Strongly prefer farmed fish (1)	6 %	4 %
Sum	100 %	100 %
Top 2 Box (NET)	38 %	47 %
Bottom 2 Box (NET)	21 %	13 %
Mean	3,3	3,5
S.D.	1,1	1,1

Project Name : Global Omni 1h 2009 - SET 1 - TABLE 2 : ALL RESPONDENTS BY ALL COUNTRIES""

Job Number :ONL5617

17.apr.09

Table 42

Q24R4. Do you prefer wild captured fish or farmed fish on....? - (R4)Freshness

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Strongly prefer wild captured fish (5)	21 %	29 %
Prefer wild captured fish (4)	23 %	25 %
No preference for wild captured fish or farmed fish (3)	42 %	43 %
Prefer farmed fish (2)	10 %	2 %
Strongly prefer farmed fish (1)	3 %	1 %
Sum	100 %	100 %
Top 2 Box (NET)	44 %	54 %
Bottom 2 Box (NET)	13 %	4 %
Mean	3,5	3,8
S.D.	1	0,9

Project Name : Global Omni 1h 2009 - SET 1 - TABLE 2 : ALL RESPONDENTS BY ALL COUNTRIES""
 Job Number :ONL5617
 17.apr.09
 Table 43

Q25. What level of influence do product labels declaring that fish is sustainably sourced have on your purchasing decision?

	Total	DK
Base: All Respondents those said Yes at Q22 (Code 1)		
Base : Unwtd	23729	487
Base : Wtd(In ' 000)	1176009	3614
Very important	27 %	16 %
Important	43 %	39 %
No influence on purchase decision	30 %	45 %
Sum	100 %	100 %

Project Name : Global Omni 1h 2009 - SET 1 - TABLE 2 : ALL RESPONDENTS BY ALL COUNTRIES""
 Job Number :ONL5617
 17.apr.09
 Table 44

Q26. Which of these products do you actively try to buy?

	Total	DK
Base: All Respondents		
Base : Unwtd	25420	502
Base : Wtd(In ' 000)	1279919	3738
Energy efficient products or appliances	53 %	24 %
Locally made products	51 %	40 %
Products in recyclable packaging	45 %	23 %
Products bought from a Farmer's Market	42 %	10 %
Organic products	35 %	62 %
Ethically produced or grown products	25 %	22 %
Products with little or no packaging	31 %	26 %
Fairtrade products	27 %	37 %
Products that have not been tested on animals	23 %	25 %
Products that haven't travelled long distances to get to the store	27 %	27 %
None of these	6 %	15 %
Sum	365 %	311 %

Project Name :Global Omni - Total

Project Number :ONL3776

12.mai.08

Table 66

Q24. On average, how often do you eat fish (including seafood)?

	Total	Denmark
Base: All		
Base : Unwtd	28153	474
Base : Wtd	28153	84
6 or more times a week (6)	2 %	3 %
3 to 5 times a week (4)	14 %	13 %
1 to 2 times a week (1.5)	40 %	43 %
Less often than once a week (1)	29 %	31 %
Rarely or never (0)	14 %	10 %
Sum	100 %	100 %
Top 2 Box (NET)	17 %	16 %
Bottom 2 Box (NET)	43 %	41 %
Mean	1,6	1,7
S.D.	1,3	1,3

Project Name :Global Omni - Total

Project Number :ONL3776

12.mai.08

Table 67

Q25. What are the main reasons you don't eat fish?

	Total	Denmark
Base: Ask Only From Those Who Coded 5 In Q24		
Base : Unwtd	3340	38
Base : Wtd	3937	9
It's not easily available	8 %	-
I don't like the taste	33 %	54 %
I don't like the appearance (fins, scales, head)	14 %	41 %
I don't like the bones	21 %	21 %
I don't like the smell	32 %	61 %
I don't know how to cook it	12 %	9 %
It's too expensive	17 %	14 %
I'm opposed to eating fish because of my personal beliefs	15 %	4 %
Other	26 %	33 %
Sum	179 %	236 %

Project Name :Global Omni - Total
 Project Number :ONL3776
 12.mai.08
 Table 68

Q26. Is the fish you eat at home purchased fresh or frozen?

	Total	Denmark
Base: Ask Only From Those Who Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Mainly fresh	42 %	32 %
Fresh and frozen about equally	34 %	36 %
Mainly frozen	22 %	26 %
Other	3 %	6 %
Sum	100 %	100 %

Project Name :Global Omni - Total
 Project Number :ONL3776
 12.mai.08
 Table 69

Q27. Are you eating more or less fish in your diet now than two years ago?

	Total	Denmark
Base: All		
Base : Unwtd	28153	474
Base : Wtd	28153	84
Much more (5)	5 %	4 %
More (4)	24 %	31 %
About the same (3)	49 %	55 %
Less (2)	11 %	4 %
Much less (1)	5 %	3 %
Have never eaten fish	5 %	3 %
Sum	100 %	100 %
Top 2 Box (NET)	29 %	35 %
Bottom 2 Box (NET)	16 %	7 %
Mean	3,1	3,3
S.D.	0,9	0,7

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 70

Q28. If cost was not an issue would you eat more fish than you do now?

	Total	Denmark
Base: All		
Base : Unwtd	28153	474
Base : Wtd	28153	84
Much more (3)	19 %	15 %
More (2)	31 %	27 %
About the same (1)	42 %	52 %
I don't eat fish	7 %	7 %
Sum	100 %	100 %
Mean	1,8	1,6
S.D.	0,8	0,8

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 71

Q29. If the type of fish you usually eat became too expensive, please choose your most likely course of action.

	Total	Denmark
Base: Ask Only From Those Who Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Buy something else instead e.g. meat or poultry	17 %	18 %
Buy a cheaper type of fish	39 %	43 %
Buy a smaller amount of the fish	35 %	28 %
Stop buying/ eating fish	6 %	4 %
Other	3 %	7 %
Sum	100 %	100 %

Project Name :Global Omni - Total

Project Number :ONL3776

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Table 72

Q30. Below are a number of statements about fish and seafood consumption.(SUMMARY)

Project Name :Global Omni - Total

Project Number :ONL3776

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Table 73

Q30. Below are a number of statements about fish and seafood consumption. - (R1) Fish is good for me

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	48 %	50 %
Agree (4)	40 %	44 %
Neither agree or disagree (3)	8 %	3 %
Disagree (2)	1 %	0
Strongly disagree (1)	2 %	1 %
Don't know	1 %	2 %
Sum	100 %	100 %
Top 2 Box (NET)	88 %	94 %
Bottom 2 Box (NET)	3 %	1 %
Mean	4,3	4,4
S.D.	0,8	0,7

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 74

Q30. Below are a number of statements about fish and seafood consumption. - (R2) Fish is healthier than meat or chicken

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	28 %	14 %
Agree (4)	39 %	34 %
Neither agree or disagree (3)	24 %	35 %
Disagree (2)	5 %	9 %
Strongly disagree (1)	2 %	2 %
Don't know	3 %	7 %
Sum	100 %	100 %
Top 2 Box (NET)	66 %	48 %
Bottom 2 Box (NET)	7 %	10 %
Mean	3,9	3,5
S.D.	0,9	0,9

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 75

Q30. Below are a number of statements about fish and seafood consumption. - (R3) Fish is a cheap way for me to eat healthily

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	11 %	7 %
Agree (4)	32 %	17 %
Neither agree or disagree (3)	32 %	31 %
Disagree (2)	18 %	31 %
Strongly disagree (1)	4 %	7 %
Don't know	2 %	7 %
Sum	100 %	100 %
Top 2 Box (NET)	43 %	25 %
Bottom 2 Box (NET)	22 %	37 %
Mean	3,3	2,9
S.D.	1	1,1

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 76

Q30. Below are a number of statements about fish and seafood consumption. - (R4) I support the adding of Omega 3 to fish to make it more healthy

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	12 %	3 %
Agree (4)	23 %	6 %
Neither agree or disagree (3)	30 %	17 %
Disagree (2)	15 %	36 %
Strongly disagree (1)	7 %	25 %
Don't know	13 %	14 %
Sum	100 %	100 %
Top 2 Box (NET)	35 %	9 %
Bottom 2 Box (NET)	22 %	60 %
Mean	3,2	2,2
S.D.	1,1	1

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 77

Q30. Below are a number of statements about fish and seafood consumption. - (R5) I prefer to eat fish products that are ethically sourced and kinder to the environment

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	25 %	24 %
Agree (4)	35 %	42 %
Neither agree or disagree (3)	27 %	21 %
Disagree (2)	5 %	4 %
Strongly disagree (1)	3 %	3 %
Don't know	4 %	6 %
Sum	100 %	100 %
Top 2 Box (NET)	61 %	67 %
Bottom 2 Box (NET)	8 %	6 %
Mean	3,8	3,9
S.D.	1	0,9

Project Name :Global Omni - Total
Project Number :ONL3776
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Table 78

Q30. Below are a number of statements about fish and seafood consumption. - (R6) I prefer fish products that are sustainably sourced

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	17 %	19 %
Agree (4)	31 %	36 %
Neither agree or disagree (3)	33 %	27 %
Disagree (2)	9 %	4 %
Strongly disagree (1)	3 %	2 %
Don't know	7 %	12 %
Sum	100 %	100 %
Top 2 Box (NET)	49 %	55 %
Bottom 2 Box (NET)	11 %	6 %
Mean	3,6	3,7
S.D.	1	0,9

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 79

Q30. Below are a number of statements about fish and seafood consumption. - (R7) Fish is good value for money compared with meat and chicken

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	11 %	8 %
Agree (4)	27 %	23 %
Neither agree or disagree (3)	34 %	33 %
Disagree (2)	18 %	23 %
Strongly disagree (1)	5 %	4 %
Don't know	5 %	10 %
Sum	100 %	100 %
Top 2 Box (NET)	38 %	30 %
Bottom 2 Box (NET)	23 %	27 %
Mean	3,2	3,1
S.D.	1	1

Project Name :Global Omni - Total
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Table 80

Q30. Below are a number of statements about fish and seafood consumption. - (R8) Fish has become more expensive over the last year

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	22 %	19 %
Agree (4)	41 %	40 %
Neither agree or disagree (3)	22 %	16 %
Disagree (2)	5 %	5 %
Strongly disagree (1)	2 %	0
Don't know	9 %	19 %
Sum	100 %	100 %
Top 2 Box (NET)	64 %	59 %
Bottom 2 Box (NET)	6 %	5 %
Mean	3,9	3,9
S.D.	0,9	0,9

Project Name :Global Omni - Total
Project Number :ONL3776
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Table 81

Q30. Below are a number of statements about fish and seafood consumption. - (R9) Frozen fish is just as healthy as fresh fish

	Total	Denmark
Base: Only Those Who Have Coded 1-4 In Q24		
Base : Unwtd	24813	436
Base : Wtd	24216	75
Strongly agree (5)	6 %	13 %
Agree (4)	23 %	37 %
Neither agree or disagree (3)	29 %	23 %
Disagree (2)	28 %	16 %
Strongly disagree (1)	7 %	2 %
Don't know	6 %	10 %
Sum	100 %	100 %
Top 2 Box (NET)	30 %	50 %
Bottom 2 Box (NET)	35 %	18 %
Mean	2,9	3,5
S.D.	1,1	1

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 82

Q30. Below are a number of statements about fish and seafood consumption. - (R10) Frozen fish is good to buy because it suits our busy lifestyle

	Total	Denmark
Base: Only Those Who Coded 2 Or 3 In Q26		
Base : Unwtd	14550	267
Base : Wtd	13449	46
Strongly agree (5)	12 %	9 %
Agree (4)	41 %	36 %
Neither agree or disagree (3)	31 %	36 %
Disagree (2)	11 %	10 %
Strongly disagree (1)	3 %	3 %
Don't know	2 %	5 %
Sum	100 %	100 %
Top 2 Box (NET)	52 %	45 %
Bottom 2 Box (NET)	14 %	14 %
Mean	3,5	3,4
S.D.	0,9	0,9

Project Name :Global Omni - Total
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Table 83

Q30. Below are a number of statements about fish and seafood consumption. - (R11) The most important reason for buying frozen fish is that it is better value for money than fresh

	Total	Denmark
Base: Only Those Who Coded 2 Or 3 In Q26		
Base : Unwtd	14550	267
Base : Wtd	13449	46
Strongly agree (5)	9 %	9 %
Agree (4)	29 %	26 %
Neither agree or disagree (3)	35 %	31 %
Disagree (2)	18 %	19 %
Strongly disagree (1)	5 %	6 %
Don't know	4 %	9 %
Sum	100 %	100 %
Top 2 Box (NET)	38 %	35 %
Bottom 2 Box (NET)	23 %	25 %
Mean	3,2	3,2
S.D.	1	1,1

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 84

Q31. Are you eating more or less meat in your diet now than two years ago?

	Total	Denmark
Base: All		
Base : Unwtd	28153	474
Base : Wtd	28153	84
Much more (5)	3 %	-
More (4)	13 %	8 %
About the same (3)	55 %	71 %
Less (2)	21 %	17 %
Much less (1)	5 %	3 %
Don't eat/ Have never eaten meat	4 %	0
Sum	100 %	100 %
Top 2 Box (NET)	16 %	8 %
Bottom 2 Box (NET)	26 %	20 %
Mean	2,9	2,8
S.D.	0,8	0,6

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 85

Q32. If cost was not an issue would you eat more meat than you do now?

	Total	Denmark
Base: All		
Base : Unwtd	28153	474
Base : Wtd	28153	84
Much more (3)	6 %	1 %
More (2)	16 %	11 %
About the same (1)	73 %	87 %
I don't eat fish	5 %	1 %
Sum	100 %	100 %
Mean	1,3	1,1

S.D.

0,6

0,4

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 86

Q33. Are you eating more or less poultry in your diet now than two years ago?

	Total	Denmark
Base: All		
Base : Unwtd	28153	474
Base : Wtd	28153	84
Much more (5)	4 %	2 %
More (4)	21 %	21 %
About the same (3)	58 %	66 %
Less (2)	11 %	9 %
Much less (1)	3 %	1 %
Don't eat/ Have never eaten poultry	4 %	1 %
Sum	100 %	100 %
Top 2 Box (NET)	24 %	23 %
Bottom 2 Box (NET)	14 %	10 %
Mean	3,1	3,1
S.D.	0,8	0,6

Project Name :Global Omni - Total
Project Number :ONL3776
12.mai.08
Table 87

Q34. Are you eating more or less dairy in your diet now than two years ago?

	Total	Denmark
Base: All		
Base : Unwtd	28153	474
Base : Wtd	28153	84
Much more (5)	4 %	1 %
More (4)	22 %	12 %
About the same (3)	56 %	70 %
Less (2)	13 %	13 %
Much less (1)	3 %	3 %
Don't eat/ Have never eaten dairy	2 %	1 %
Sum	100 %	100 %
Top 2 Box (NET)	27 %	13 %
Bottom 2 Box (NET)	15 %	16 %
Mean	3,1	2,9
S.D.	0,8	0,6

Appendix 15: Audio-file of interviews

Track 1 – Svein Halbjørn Steien

Track 2 – Nicole Linde Jensen

Track 3 – Jesper Lehmann