Mapping exercise:
How could creative industries foster innovation in tourism in the Northern Dimension area?

Country Report – Finland

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Team: Terry Sandell, Lila Skarveli

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LIST OF ABBREVIATIONS

Acronym/abbreviation	Meaning
CCI	Cultural and Creative Industry
CCS	Cultural and Creative Sector
CF	Culture Finland
CIF	Creative Industries Finland
DCMS	Department for Culture, Media and Sport
DMO	Destination Marketing Organization
EAFRD	European Agricultural Fund for Rural Development
EDEN	European Destinations of Excellence
EEC	European Economic Community
ELY	Centres for Economic Development, Transport and the Environment
ERDF	European Regional Development Fund
ESF	European Social Fund
EU	European Union
FWC	Framework Contract
GDP	Gross Domestic Product
HDI	Human Development Index
ICT	Information Communication Technology
IPR	Intellectual Property Rights
ND	Northern Dimension
NDPC	Northern Dimension Partnership on Culture
OECD	Organisation for Economic Co-operation and Development
SaaS BI	Software as a Service Business Intelligence
SMEs	Small and Medium Enterprise
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
VR	Virtual Reality

1. INTRODUCTION AND KEY POINTS

This is one of eleven reports on the countries of the Northern Dimension (ND) and should be read in conjunction with a twelfth 'regional/cross-country' report. The reports have been produced under the EU BENEF Lot 9 FWC contract 'Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?' in line with the terms of reference for that contract. The reports follow what was agreed at the inception report stage. Throughout the period during which the work has been done there has been close and positive liaison with the executive of the Northern Dimension Partnership on Culture (NDPC). The reports that have been produced are based on extensive consultation and research involving a large range of people. These people included country specialists and officials to whom we are very much indebted.

Under the terms of reference the timetable for the work started in February 2016 with completion scheduled for December 2016. The allocation of time for the work was 105 days, split between the two team members, 55 days for Lila Skarveli and 50 days for Terry Sandell, the Team Leader[1]. Given the number of countries, and their diversity, and given the very wide subject matter involving three very dynamic and currently fashionable areas - Cultural and Creative Industries, Tourism and Innovation - the time constraint was a very real challenge indeed. Amongst other things, it meant that while country visits of about five working days to all of the countries took place, it was physically only possible in most cases to visit one city, usually the capital. That said, every effort was made to secure a country overview which took into account at least some of the important developments taking place in the regions.

Quite soon after starting our work various interesting, sometimes challenging, questions arose, such as:

- Is there any reason why tourism itself is not considered one of the creative industries?
- In all three cases, the definitions of CCIs, tourism and innovation are various, unstable and contested. Is this because the necessary action to define them precisely and consistently at a European level has not been taken or is it because we are in a 'post-definitional' era with certain areas of human social and economic activity having become too diverse and complex to categorise easily?
- Tourism is a high priority for most Northern Dimension countries yet there were protests against tourism recently in Barcelona, arguably the most successful European city in terms of its tourism development and city brand. What does this signal about sustainability and local community engagement with/in tourism?
- When they do talk, do the tourism industry and the cultural and creative sectors speak the same language?
- Is the tourism industry's use of culture and heritage because of real engagement with the cultural and creative sectors or in spite of it? Even when they are moving in the same direction are they in reality on parallel but essentially separate tracks?
- Should tourism businesses be engaging with CCIs or vice versa, in which direction is the demand and in which direction the supply?
- Given that both sectors are to a large extent highly fragmented with a numerical predominance of SMEs, to what extent do the actors involved have the time and capacity to engage with each other innovatively or otherwise?

[1] Terry Sandell took responsibility for the Estonia, Finland, Latvia, Lithuania and Russian Federation reports and Lila Skarveli for the Denmark,Germany, Iceland, Norway, Poland and Sweden reports.

- Do the bridges that need to be built between CCIs and the tourism sector include new intermediaries who can identify, interpret, broker and manage tourism-CCI/CCI-tourism synergies?

In the last couple of years there has been increasing interest in looking at the existing and potential linkage of the cultural and creative industries to tourism development. It however throws up considerable practical and methodological challenges and problems for various reasons and explains why relatively little progress seems to have been made. The major first hurdle is that the definition of cultural and creative industries is constantly evolving and, moreover, it differs from country to country[2]. This has been particularly evident in the case of the eleven Northern Dimension countries, even in the case of those countries which work very closely together, for example in the case of Lithuania, Latvia and Estonia. There can also be conceptually quite different national approaches. For example in one country cultural and creative industries may be seen as a distinct sector and be supported on that basis. In another country they may not even be seen as a sector but as part of something wider or cross-cutting such as one part of the creative economy, or as a part of national innovation, entrepreneurship or SME policies. The third issue flows from the other two. Because of an evolving and differing understanding in country terms of what the CCIs constitute, there is no common statistical base which allows clear comparisons or benchmarking, something which is urgently needed and is beginning to start being explored at European level.

If one turns to the tourism sector, there are similar parallel problems. The collection of statistics (e.g. number of nights' accommodation) may be firmly in place but those statistics are partial and beginning to look increasingly inadequate as they are often not taking account of revolutionary changes affecting the tourism and travel industries. The continuing, growing importance of OTAs[3] and an emerging peer-to-peer and sharing economy affecting such areas as traditional tourism accommodation are often not being captured by the traditional industry information systems.

Tourism categorisation is also constantly evolving with the existence of an increasing number of sub-sectors. Even cultural tourism, a sub-sector itself, can be broken down into possibly a dozen or more sub-sectors such as heritage tourism, arts tourism, creative tourism, urban cultural tourism, rural cultural tourism, indigenous cultural tourism, experiential and gastronomic tourism, 'dark' tourism[4], often with overlaps with other forms of tourism e.g. adventure tourism, health and well-being tourism and so on[5]. Again there are definitional differences from one country to another and certain types of tourism may be more developed or be more of a national tourism priority in one country compared to another.

The complications of identifying at a general level the existing and potential linkage of CCIs to the tourism sector is exacerbated by certain tourism sub-sectors being in their own right part of the cultural sector itself, for example in the case of heritage tourism. Both the CCIs and the tourism sector are not in reality clearly demarcated - both are imprecise, fluidly-defined, fast-changing and dynamic areas of complex and

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[2] Committee on Industry, Research and Energy and Committee on Culture and Education of the European Parliament Draft Report (23 June 2016) 'On a coherent EU policy for cultural and creative industries' (2016/2072(INI): 'Alongside a clear definition that takes into account all sectors related to CCIs, the co-rapporteurs believe it equally necessary to have comparable and reliable statistical data. Each Member State has, in fact, its own classification of CCIs. It is therefore essential to adopt at EU level an updated framework for the sector and to map changes over time. The objective should be to identify specific indicators to measure the results of policies for the promotion of the sector.'

[3] Online travel agencies (such as Expedia, Booking.com etc.)

[4] Tourism in which visits are made to sites, attractions or exhibitions connected with suffering, death, disaster and negative or macabre events.

[5] Melanie K. Smith in her 'Issues in Cultural Tourism Studies' (Routledge, 2009) pp. 18-19 lists thirteen categories of cultural tourism which she reduces to nine and later seven broad sub-sectors. See Appendix X of the Regional Report for a detailed 'Typology of Cultural Tourism'.

important economic and social activity. In the case of CCIs there are other complications. For example the arts 'lobbying industry' has for many years ubiquitously used the terms cultural industries and creative industries interchangeably in order to protect or bolster publicly-funded culture budgets. Although things have moved on and in many countries the importance of the arts, for example, is recognised and understood as a part of the creative industries value chain, there is still often a lot of blurring and definitional confusion[6].

Perhaps naively, we had the intention at the outset of our work of trying to bring some clear and overarching, definitional discipline to our subject. This brave intention was eliminated as a result of almost the first day of the first country visit where it was clear that there were very local and legitimate interests, debates and specificities and that it would be artificial to impose on countries definitions and categories that might work for some but not for others. Imposing definitions would in some cases have been positively distorting to an understanding of the local CCI situation. It should also be mentioned, as will be seen from the two footnote references above to a very recent European Parliament report, that even at EU level, where the cultural and creative industries have soared to a position of highest importance in terms of policy, terminology is often loose, for example with both the terms Cultural and Creative Sectors (CCS) and Cultural and Creative Industries (CCI) being used.

In the context of our work we therefore felt there was no alternative but to assess the cultural and creative industries and the tourism sector in the individual countries in their own terms and then with the regional/cross-country report to try to bring them together.

Although it is right to look at ways of increasing the synergies between the tourism industry and CCIs it is important to recognise that there is already a substantial level of engagement. For example even a superficial listing of the main CCIs illustrates how they are already contributing to the tourism sector:

- Software and digitalisation - this has had a revolutionary impact on many aspects of the tourism industry, not least in the role that OTAs[7] play (e.g. TripAdvisor, booking.com, Expedia, Airbnb etc.)
- Design, especially graphic design but also right the way through all aspects of design including 'son et lumière' spectacles, light festivals and events etc.
- Music for place branding, ambience, open-air concerts etc.
- Advertising and broadcasting - the importance of these areas to the tourism industry are self-evident
- Film and cinema - promos, travelogues, film location tourism
- Theatre - use of actors as animators or for audio guides, staged events, historical pageants and re-enactments etc.
- Festivals - a major element in event tourism and place branding
- Crafts and antiques - as part of shopping and souvenirs

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[6] Committee on Industry, Research and Energy and Committee on Culture and Education of the European Parliament Draft Report (23 June 2016) 'On a coherent EU policy for cultural and creative industries' (2016/2072(INI): [The European Parliament] 'Calls on the Commission to design its future policies based on the following definition of CCIs: 'cultural and creative industries are those industries that are based on cultural values, individual creativity, skills and talent with the potential to create wealth and jobs through generating value from intellectual property. They include the following sectors relying on cultural and creative inputs: architecture, archives and libraries, artistic crafts, audio-visual (including film, television, video games and multimedia), cultural heritage, design, creativity-driven high-end industries and fashion, festivals, music, performing arts, books and publishing, radio and visual arts'.

[7] Online travel agencies.

- Architecture - the tourism industry's use of built heritage and use/commissioning of significant buildings (including as hotels)
- Publishing - travel and guide books are still very popular
- Fashion - place image and branding, folk costumes etc.
- Gaming, augmented reality and VR - perhaps still at an early stage but already being used even by big, traditional tourism operators such as Thomas Cook
- Food and local natural products - food festivals, branding ('appellation') and gastrotourism in both urban and rural contexts

So the real question is could, and should there, be more interaction? Is there either 'market failure' or under-utilised potential and resources? Out of which flow other questions, for example, is existing CCI-tourism interaction because of effective (vertical) policies or in spite of them? Does a (horizontal) common language exist with regular dialogue producing the development of shared interests between the CCI and tourism sectors? Are there particular tourism sub-sectors and CCI sub-sectors more suited to innovative interaction and more able to produce new cooperation methods, models and paradigms? If there is 'market failure' or under-utilised potential and resources, what kind of intervention or incentivisation is required to make the CCI sector and tourism industry interact more effectively?

As illustrated above, a lot is going on between the various CCI sub-sectors and the tourism industry so there is not classic 'market failure' but rather of 'under-utilisation' which warrants and justifies intervention. Tourism and the CCIs share many characteristics. They are fragmented, dynamic, numerically dominated by SMEs, micro-businesses and sole traders, preoccupied with themselves and often chaotic. They each have their own agendas. There is lack of a common language between them, probably attributable in part simply to lack of time. In general there does also seem to be a lack of 'savoir faire' in terms of their engaging with each other, innovatively or otherwise! For the CCI sector developing clustering appears to be very helpful but CCIs and tourism actors have so far not naturally clustered. Most importantly there have been few practical measures (although there are some good exceptions) to bring tourism professionals and CCI actors together which at the very minimum requires active policy-maker interest, 'interpreters', some funding and participative commitment.

A very important question is to what extent any synergies currently taking place between the cultural and creative sectors and the travel and tourism industry are because of, or in spite of, current 'vertical' policies. While political mention of CCIs contributing to other sectors is frequent, including sometimes in policy documents, it tends not to be targeted in any practical way. There is probably more than one reason for this. It is a fact that the concept of CCIs is still relatively new (even if one traces it back to the 1990s) and is possibly part of the explanation. One suspects that although the role of the CCIs in terms of their economic and social benefits is increasingly being recognised by European governments there is probably still fairly widespread an issue of real understanding of the CCI phenomenon and the nature of their potential. This is then at the political and policy level greatly exacerbated by the problem of poorly 'joined-up' government/administration which particularly affects those areas which need to be politically and economically managed in a 'horizontal' cross-cutting way. A further issue in some countries is that governments often are not imaginative at working with, and for, the private sector especially in relation to SMEs, micro businesses and sole traders. Furthermore, there is also an issue of ownership. Which ministry or administration is responsible for CCI development: Culture? Economy? Industry? Innovation? Business?…Shared? Or are the CCIs themselves, much of the time operating in the private sector, responsible for their own development?

In the case of the other side of the equation - tourism - who is responsible for developing tourism services, products and events especially in relation to an area like cultural tourism? In most cases, it is not government but SMEs, independent commercial and non-commercial entrepreneurs and cultural institutions acting entrepreneurially or imaginatively, not in fact the Ministries of Tourism. It is almost a universal fact that policy-makers traditionally focus on what they directly control and manage unless lobbied to do otherwise. Leadership and representation in the CCI sub-sectors in many countries is not very well-developed so lobbying is weak and the CCI sector as a whole covers such a wide area and diverse interests that lobbying as a 'sector' is most of the time not realistic.

It should also be recognised that the CCIs have not been noticeably lobbying for more engagement with the tourism industry while the tourism industry, although much better organised in terms of sector and sub-sector representation, has not been noticeably developing an agenda for greater joint dialogue and exploration with the CCI sector.

Again one needs to ask a question, this time the question is why such an agenda has not been developed in the past? It would seem that it may simply be to do with the complexity and chaotic nature of the two sectors. For example, how many sub-sectors does the tourism industry have? If one takes just one of those numerous sub-sectors, for example, cultural tourism, how many sub-sub-sectors does cultural tourism in turn have? As for the CCIs - how many are they? It depends on the country but in most cases about a dozen. But again if one looks at one of them individually, such as design, it becomes complex. In one Northern Dimension country design is officially defined according to about 25 sub-sectors!

In looking at how the creative industries could foster innovation in tourism in the Northern Dimension area one needs to take into account all the factors mentioned above. It has seemed very clear from our work that to get the two chaotic and fragmented sectors to begin to work better together and feed off each other it will be impossible to identify a single unified interface or find a'magic bullet'. This is not of course the answer politicians, policy-makers and economic planners want. It is however the reality. If progress is to be achieved in getting the CCS/CCI sector to engage more and in a systematic and synergistic way with the tourism sector, there is a need to be selective, realistically focussed and take a segmental approach. Developing effective methods, models and paradigms for CCI-Tourism cooperation and interaction will only come through such an approach.

Our work suggests that in being selective, and in relation to the Northern Dimension region, the most productive tourism target areas are probably going to be heritage tourism, creative tourism (including routes and trails, gastronomy and rural tourism) and events tourism. Heritage tourism is in many of the countries well developed. That said, there are plenty of sites, many museums....but how many apps? Creative tourism, which we define more clearly below, is a natural ground for all types of CCS/CCI involvement. Cultural routes and trails open up all sorts of innovative opportunities as visitors are there for the experience and need to move, learn, eat, sleep and interact. Cultural routes can of course also be cross-border and multi-country projects drawing Northern Dimension countries into mutually beneficial cooperation. Gastronomy or gastrotourism is also booming in parts of the Northern Dimension area, either as a result of a planned tourism development (e.g. the joint Nordic Food promotion which was launched some years ago, and because of its success, followed by a Nordic Fashion initiative later) or as a practical research area (as in the case of the work currently being done in St Petersburg at the Higher School of Economics). Rural tourism's special challenges - information, communication and access - are also fields of opportunity for CCIs. Events tourism, a priority in many of the Northern Dimension countries, is still not a saturated area, even if it is becoming more competitive, with new festivals of all types mushrooming in the region which are natural meeting grounds for inputs from the CCS/CCI into tourism development. In the case of tourism-based festivals policy in particular, the CCIs could be encouraged to provide the background linkage, depth and continuity for festivals and events that are by their nature often one-off, narrowly-focussed, sometimes self-absorbed and usually of short duration.

Why not classical music festivals (with their dying audiences!) linked to co-located youth-oriented fashion pop-ups? Using the local CCS/CCI resource as year-round linkage or continuity is already happening in some places in the Northern Dimension area.

Accepting that the creative industries already contribute a lot to the travel and tourism industry but that there could be a more developed relationship especially if targeted at a few very specific tourism sub-sectors, what kind of intervention is needed? At a policy level the first steps would seem to be a need for increased awareness, understanding and interest, in fact the classic 'Hawthorne Effect'. Policy encouragement of 'bottom-up' initiatives and 'horizontal' engagement combined with 'top-led' imaginative and sensitive strategic place branding and effective destination management marketing are probably part of the needed formula. Awareness of the potential of the CCI-tourism relationship needs however to be proactively promoted, in particular by encouraging it to be put on tourism industry agendas and feature as a discussion topic at industry fairs, conferences, events and through industry information channels. Awareness-raising is also needed in the opposite direction by making CCIs more aware of the importance and potential of the tourism sector as a partner and market for creative industries' goods and services. This needs to be done through making it a practical agenda item at CCI events and gatherings and through 'word of mouth'. There is also a need simply to bring tourism and CCI professionals together to create dialogue and some new and practical 'bridges'. As mentioned earlier, there is little evidence of a common language and there is probably a need for an intermediary cadre of industry 'producer-interpreters' from both sectors.[8]

While in many of the Northern Dimension countries past problems are beginning to be addressed related to finance and investment for CCIs given their non-traditional industry attributes, this is usually manifesting itself in facilitating their access to existing investment, innovation or SME funding schemes which are non-CCS/CCI specific and very general in nature[9]. If real progress is going to be made in drawing the CCI and tourism sectors closer together and more productively then there is probably going to be a need for there to be specific and narrowly targeted encouragement and support opportunities and schemes. In practice this probably means that there is a need for specialised agencies (e.g. Innovation Norway, Swedish Agency for Economic and Regional Growth, Enterprise Estonia, Finland's Tekes etc) to focus on this. The CCIs and the tourism sector are often travelling in the same direction but on parallel rails and not on the same track with shared (but perhaps different) 'win-win' goals, something which the specialised agencies could address. The fact is, as already mentioned, the CCI and tourism sectors are dynamic, chaotic sectors and so fragmented that even within each individual sector there are awareness problems, knowledge deficits and communication gaps.

As suggested above a focus should be on heritage tourism, creative tourism (including routes and trails, gastronomy and rural tourism) and events tourism as these areas seem to be the most fruitful for synergistic and innovative engagement with the CCI sector. Heritage and events tourism are self-evidently understandable but the important and still emerging area of 'creative tourism', which we believe perhaps has the most relevance and potential for many of the CCIs, needs some explanation.

It is important to elaborate a little on what creative tourism is, or rather what it is becoming. The concept of creative tourism emerged about fifteen years ago but in the narrow context of people travelling to destinations to follow a course or learn something in a structured setting e.g. to do a cookery course or to learn a language. In recent times, influenced by the dynamism of the CCI sector, creative tourism

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[8] A particularly interesting project, Luova Matka, is currently taking place in Finland which is addressing this issue.
[9] New ways of providing investment finance specifically for CCIs is of course being explored at European level through one strand of the Creative Europe programme.

development has taken on a much wider meaning and includes any tourism experience which involves not only formal but also non-formal or informal learning. Creative tourism is a 'work-in-progress' in that it is seen by some as also having an important co-creation dimension to it i.e. where the tourism provider and the tourism consumer co-create the tourism experience. It is also often seen as embracing all experiences and learning related to a specific place, even those that have not been traditionally perceived as 'tourism' experiences. The local dimension and active participation by 'locals' is also often considered another essential ingredient. Unlike traditional cultural/heritage tourism, creative tourism embraces not only historical culture but also very much contemporary culture. Finally creative tourism can be seen as a reaction to traditional cultural tourism that has sometimes turned into 'serial reproduction'[10] or 'Gettyisation'[11]. There is a demand for distinctively individualised and active experience, not passive consumption of, for example, a franchised Getty museum. Recognition of the importance of this new form of tourism came in 2014 with OECD commissioning the first serious non-academic study of it.[12]

This already important discernible movement to a new form of individualised, co-created tourism opens up real and innovative opportunities for the cultural and creative sectors to explore and establish new and active relationships with the tourism sector. As is made clear in the regional/cross-country report it will require practical intervention and certain types of support as for all their similarities in terms of being quintessential post-industrial economic sectors, the CCIs and the tourism industry do not speak the same language. Focussing on how 'bridges' can be built between targeted CCIs on the one hand and creative tourism and traditional cultural tourism on the other is probably the best way to start to get the wider tourism industry and the whole spectrum of the cultural and creative sectors travelling more often and more productively on the same track and with mutually-beneficial and genuinely shared agendas rather than on separate, parallel paths as seems so often the case.

In the country reports we try to take stock of the current state of the CCIs, of the tourism sector, the general climate of interaction between them, and the general degree of the country's interaction with other Northern Dimension countries plus we provide some country case studies. It should be said that it may have partly been because of the severe time constraint already alluded to at the beginning of this report but good case studies were not easy to find. We believe that this reflects perhaps two things. The first is that there are not abundant good examples of the CCS/CCI and tourism sectors developing together innovatively or that the good examples are not recognised or particularly well known in the countries concerned.

In the regional report we bring things together, present an analysis, draw some conclusions and make recommendations which we hope may help to take things forward.

<u>Key points related to Finland include:</u>

- For the past decade there has been a consistent and thorough attempt to integrate culture in a practical way into wider contexts. In Finland it is in these wider contexts and in a holistic manner that culture and the cultural and creative industries are being explored and debated. Three policy documents can be mentioned to illustrate this approach: the terms of reference of the report 'Culture - Future Force. Report on the futures of culture' (2010); the 'Cultural Environment Strategy 2014-20' and the 'Art and Culture for Well-being - proposal for an action programme 2010-2014'.

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[10] Greg Richards and Julie Wilson: Developing Creativity in tourist experiences: A solution to the reproduction of culture? in Tourism Management 27 (2006), pp 1209-1223.
[11] A phenomenon sometimes referred to as 'Macdonaldsisation'
[12] OECD (2014), Tourism and the Creative Economy, OECD Publishing, Paris.
DOI: http://dx.doi.org/10.1787/9789264207875-en

- This 'wider context approach' rather than a narrowly sectoral approach has also been reflected in funding. During the period 2007-2014, for example, a considerable amount of funding was allocated to culture-related projects from EU Structural Funds. The activities of the EU Structural Funds and those of the European Agricultural Fund for Rural Development have in fact had an impact on the Finnish cultural sector ever since Finland joined the EU in 1995 and have become important instruments for cultural policy especially at regional and local levels.
- There are national policies clearly focussed on intangible value creation, creative entrepreneurship, innovation, design and intellectual property rights, promotion of business and entrepreneurship in the creative industries. These areas have been incorporated into a Policy Programme for Intangible Value Creation (2014-2020).
- The current Finnish policy debate related to CCS/CCI is about innovation and intangible value creation focussed on wider multidisciplinary perspectives rather than on simply the culture and creative industries as a sector.
- In Finland much attention is being given to entrepreneurship with a specific development strategy established for entrepreneurship in the creative industries sector to improve the country's competitiveness.
- The strategic objectives of the development of entrepreneurship in the creative industries sector established in 2015 are 'to create a favourable operating environment for creative companies and encourage innovation. It is understood that CCIs need an operating environment at both regional and national level in which their special characteristics are not a threat but an opportunity and so that new kinds of products and services can be created for various sectors'.
- Very interesting CCS/CCI initiatives have also been developed outside of Helsinki. Some of the activity which has taken place in Turku, for example, are particularly relevant. One included creation of a Tourism and Experience Management Cluster under a national Centre of Expertise Programme (2011-13) which involved Turku, Helsinki, Rovaniemi, Savonlinna and Jyvaskyla. This cluster project concentrated mainly on developing cultural tourism from a local perspective and from a national perspective. Linked to it was the kulmat.fi project and site. The site is dedicated to the development of 'cultural business', providing information to tourism, culture and creative industries actors.
- There is a clear, sophisticated and now well-established understanding in Finland of the creative economy and at the policy and strategy level, understanding and commitment that the CCS/CCIs are a very significant part of the national economy in their own right and are of potential major critical importance in terms of strengthening the competitiveness of other sectors.
- The country has a consciously-adopted and Finland-specific definition of cultural tourism which is that it is about the specifically Finnish way of life in all its aspects. The target market is similarly defined in an original way as people who are 'modern humanists'. This target market of 'modern humanists' is not offered the traditionally-marketed 'cultural travel destination' but a unique offer of cultural elements - Finnish way of life, heritage and cuisine.
- Finland has a wealth of experience and research on which to draw and much can be learnt from what they have already explored and achieved in relation to CCS/CCI development, innovation, entrepreneurship and linkage of the CCS/CCI sector to other sectors, including tourism.

2. BASIC COUNTRY INFORMATION

Finland was a province and later a grand duchy under Sweden from the 12th to the 19th centuries becoming an autonomous grand duchy in the Russian Empire after 1809. It gained complete independence in 1917. During World War II it defended this independence through cooperation with Germany, resisted subsequent invasions by the Soviet Union but lost territory to it. Since World War II it has transformed itself from a farm/forest economy to a diversified modern industrial country with per capita income among the highest in Western Europe. Finland joined the EU in 1995 and was the only Nordic state to join the euro single currency when it was introduced.

Contemporary Finland is an impressive modern welfare state characterised by high quality education and promotion of equality. It consistently features very high in international comparisons related to quality of life, democracy and social development.

Finland covers an area of 338,145 sq km and has a population of 5,498,211 (July 2016 estimate). Finnish and Swedish are the official languages and are spoken by an estimated 89% and 5.3%, of the population respectively. Russian is spoken by 1.3% of the population and other languages by 4.4%. The urban population represents about 85% of the total population.

Two main challenges are Finland’s ageing population (about a third are over 55 years old) and its export-driven economy which has been vulnerable since the 2008 financial crisis, and more recently, as a result of the Russian Federation’s economic problems and Ukraine-related sanctions, it being a major trading partner.

Finland was one of the best performing economies within the EU before 2009. Even though its banks and financial markets avoided the worst of the global financial crisis, the subsequent global slowdown caused Finland’s economy to contract from 2012-2014. Trade is important for Finland with exports accounting for over one-third of GDP. There is about 9% unemployment.

Against the economic background just described both CCIs and the tourism sector are seen as very high priority growth areas. They are taken fully into account in the context of wider national policies related to the development of the creative economy, innovation, competitiveness and internationalisation. Finland now has one of the leading knowledge-based economies in the world and according to the World Economic Forum Global Competitiveness Report 2014-2015 ranks second in Europe in terms of competitiveness. It is also the world-leader for innovation probably reflecting the fruits of the importance given to R&D investment which for many years has been more than 3% of GDP. About 3% of the work force, a very high percentage by world standards, is involved in the R&D sector.

Amongst many other positive features, it is appropriate to note that Finland consistently ranks high in terms of ease of trade and doing business and has been identified by Transparency International as the least corrupt country in the world.

The population of Finland is concentrated in the south. After Helsinki with a population of 558,457 Espoo (256,769) and Vantaa (190,058) are the biggest population centres but are in reality part of Greater Helsinki. The other main cities are Tampere (202,687), Turku (175,945) and Oulu (126,618). All other cities have populations of under 100,000.

3. CULTURAL AND CREATIVE SECTORS/CCIS IN FINLAND

Reflecting the wider commitment to R&D mentioned above, Finland has a strong tradition of research related both to its own cultural sector and to what is happening elsewhere, particularly in Europe.

In the past decade two trends have become increasingly evident in government-commissioned culture-related research. The first is a holistic approach to culture, its role in society and linking it to other areas such as well-being, inclusion, education and the development of future national and personal identity. The second is the role culture can play directly and indirectly in the country's post-industrial economic and regional development through support and development of culture and of the cultural and creative industries. Much of the cultural research being done in Finland has been cutting-edge and been about redefining boundaries. Because of that it has encouraged an integrated and refreshingly wider approach to culture and cultural policy, positioning it as part of something cross-cutting in the context of the creative economy, innovation policy, the environment, regional development, business internationalisation and so on.

Good examples of this holistic approach include

- the 2010 report, 'Culture - Future Force. Report on the futures of culture'
- the Ministry of Education and Culture and Ministry of the Environment's 'Cultural Environment Strategy 2014–2020'
- the Ministry of Education and Culture's 'Art and Culture for Well-being – proposal for an action programme 2010–2014'.

These three reports represent a very small part of a much wider research base generated by government, regions and municipalities, specialist agencies, universities and higher education institutions in the past decade.

To understand where Finland is now it is important to go back over the past decade to trace how policy and thinking has developed. 'Culture - Future Force. Report on the futures of culture' was commissioned in 2008 and tasked a committee to describe and assess an exhaustive range of issues as follows:

- The current state of affairs in culture and the national and international challenges facing culture
- The significance of culture for society and regions
- The significance of culture for the balanced development and welfare of people in general and different age and population groups
- Conditions and opportunities for creative artistic work
- The role of the central government, local administration, the private sector and civil society in the promotion of culture
- The situation in regional and local cultural systems with regard to equal opportunities for different age and population groups
- The importance of preserving and safeguarding cultural environments and cultural heritage and their needs and the challenges involved
- The economic and employment impacts and potential of the cultural sectors
- A review of educational, cultural, economic and other societal considerations in the promotion of culture and to assess the role of public administration in creating favourable conditions for culture
- Set goals and put forward proposals for the development of the culture sector
- Make recommendations concerning the monitoring and evaluation of cultural policy

- Make recommendations concerning the monitoring of the measures proposed in the report.

An illustration of the integration of culture into other areas was the Ministry of Education and Culture's 'Art and Culture for Well-being – proposal for an action programme 2010–2014’. This followed on from the Finnish Government developing a Policy Programme for Health Promotion which in 2008 resulted in preparations for a programme to enhance the contribution of art and culture to health and well-being for the period 2010–2014.

The aim of the Art and Culture for Well-being programme was to promote well-being and health through art and culture and to enhance social inclusion at the individual, community and societal levels. The three priority areas were (a) culture in promoting social inclusion, capacity building, networking and participation in daily life and living environments, (b) art and culture as part of social welfare and health promotion and (c) art and culture in support of well-being and health at work. There were eighteen recommended actions aimed at promoting health and well-being through art and culture which covered legislation, administration and funding, cooperation between the public, private and third sectors, research and the knowledge base, education and training, and information provision.

The Ministry of Education and Culture and Ministry of the Environment's 'Cultural Environment Strategy 2014–2020' similarly places culture clearly and practically in the mainstream of environmental planning. The point of mentioning these reports, important as they have been in their own right, is to give a flavour of the wider contexts in which culture and the cultural and creative industries are explored and debated in Finland.

This 'wider context approach' rather than a narrowly sectoral approach has also been reflected in funding of culture and the CCIs. In addition to the funding coming from the mainstream national culture budget, during the period 2007-2014 for example a considerable amount of funding was allocated to culture-related projects from EU Structural Funds. The activities of the EU Structural Funds and those of the European Agricultural Fund for Rural Development have in fact had an impact on the Finnish cultural sector ever since Finland joined the EU in 1995. Structural Funds and the Agricultural Fund have become important instruments for cultural policy in Finland especially at regional and local levels. One piece of research has estimated that there had been 700 such ESF and ERDF projects. It is thought that these projects with EU and state funding received over €200 million. In addition there were 1,075 culturally-oriented Agricultural Fund rural projects with an estimated public and private sector spend of about €72 million.[13]

Most of the ESF cultural funding was allocated to projects related to creative economy and cultural entrepreneurship, approximately €47 million. ERDF funding was allocated to creative economy and cultural tourism, each approximately €40 million and approximately €34 million to cultural infrastructure, cultural environment and cultural heritage projects. The support from the Agricultural Fund was allocated mainly to local and regional cultural infrastructure, environment and heritage projects. A significant number of the ESF projects were carried out by universities and associations and most of the ERDF projects were implemented by municipalities and municipal bodies. The cultural projects of the Agricultural Fund were carried out mainly by relatively small third-sector associations which represented nearly 70 % of all the cultural projects.

As in other countries what the CCS/CCI sector encompasses is sometimes fluid and depends on context. the main point is the general policy of incorporating them functionally into wider agendas such as national creative economy policy, general SME development, the role they can play in innovation policy and so on.

[13] Olli Jakonen and Ritva Mitchell: Additional value of EU Structural Funds and the European Agricultural Fund for Finnish cultural policy (Cupore webpublications 29, 2015)

When, however, a sectoral definition is required, Finland basically follows the UK's DCMS model of the cultural and creative industries with adaptations. Finnish creative industries therefore include the following sub-sectors:

- animation production
- architectural services
- film and TV production
- visual arts and art galleries
- handicrafts
- sports and experience services
- advertising and marketing communications
- design services
- music and entertainment services
- gaming industry
- radio and sound production
- art and antique trade
- dance and theatre
- communications

In general in Finland there has often been a preference to refer to and focus on the 'creative economy' rather than use the term cultural and creative industries. Finnish policy perception of the definition of culture and its interconnection with the economy is perhaps best understood through the following categorisation:

- Creativity culture: culture that values creativity, courage, risk-taking, etc.
- Art and culture as an expression of and inspiration for creativity
- Creative economy: commercial production based on art and culture
- Added value brought by culture to all innovation (e.g. design, brands)

Finnish government interest in the cultural and creative industries can be traced back to the late 1990's when a working group led by the Ministry of Education and involving the Ministry of Trade and Industry, the Ministry of Finance, the Ministry of Employment, the Arts Council of Finland, Tekes, universities and companies produced a report on cultural industries development including recommended actions. The result was that several programmes for development of the content industry were launched, including the Digidemo funding programme in 2002.

In 2005 the Ministry of Education and Culture set up a working group for an assessment of the economic impact of culture which led to a 2006 report and the eventual compiling of the first Culture Satellite Account which was published in 2008. This Culture Satellite Account measured and assessed the economic effect of culture and served as the first mapping document in Finland. Based on the international Tourism Satellite Accounts model, the Culture Satellite Accounts are compiled by FinStat, and take into account more fully the real cost and contribution of culture to the economy. Finland and Spain are currently the only countries in Europe to produce them. While they may be complicated and possibly costly to produce they give a much fuller understanding of the place of culture in wider national economic and social development.

The effort to include the creative economy perspective in public programmes on a wider scale emerged clearly in 2007 and was preceded by a report entitled 'Creative Industries Business Development: A

Networked Operating Model' which was published at the end of 2006 and set out the direction for many measures to develop business activities in the creative industries and to promote cultural entrepreneurship.

The Ministry of Education and Culture also launched during this period the very important Development Programme for Business Growth and Internationalisation of Creative Industries for the period 2007–2013. In the same year they additionally launched a Cultural Exports Promotion Programme for the period 2007–2011. The latter set a good example which has been followed ever since in that the Cultural Exports Programme was developed jointly by the Ministry of Employment and Economy, the Ministry of Education and Culture, the Ministry of Foreign Affairs and with full consultation with other interested parties and experts. The Ministry of Employment and Economy during this period was also producing the Development Strategy for the Creative Economy for the period 2008–2011. All of these elements show the emerging importance of CCIs at that time and the Finnish 'joined-up government' approach.

Driven by the Ministry of Employment and Economy, administered by the Ministry of Education and Culture, the important Development Programme for Business Growth and Internationalisation of Creative Industries for the period 2007–2013 was coordinated and managed by Creative Industries Finland (CIF). Creative Industries Finland (CIF) was set up in 2008 as a project to act as coordinator for the national development programme projects. Until its recent demise it provided information and services for creative industries developers, policy-makers and key interest groups, published news, facts and figures to support development of the creative economy and contributed to foresight research and planning. It organised annual events, provided platforms for networking and coordination of development activities nationally and internationally and ran workshops. CIF was partly funded out of ESF money and was run by the Small Business Center of Aalto University School of Economics, in co-operation with the Sibelius Academy, the Cities of Helsinki, Tampere and Seinäjoki and Jyväskylä Regional Development Company. CIF also directly supported professionally several projects funded by the Programme.

The Development Programme for Business Growth and Internationalization of Creative Industries for the period 2007–2013 funded some thirty projects of which about twenty were substantial ones. The Programme had as its main objectives:

- development of business activities
- strengthening of clusters and networks
- international marketing and promotion
- operating environment for cultural exportation
- cultural cooperation and exchange
- development of cultural exports structures

A couple of the projects under the Programme became de facto part of the Programme itself. One, TAIVEX, went through two phases and focused on international cooperation and export-related training. Deemed successful, it addressed an education/knowledge gap in the sector. The training also included placements abroad (for a week up to a month) in other countries, including Japan.

Another project which became a de facto strand of the Programme was the Sillanrakentajat (Bridge-building) Training Programme for Agents and Export Professionals in the Cultural and Creative Industries. This project addressed the gap in basic arts and cultural education at tertiary level where little or no attention was being given to the essential roles played in the cultural and creative sectors by producers, mediators, agents and those who broker international partnerships.

Another government programme, the Cultural Export Promotion Programme was developed in 2005-2007 and implemented between 2007 and 2011 by a partnership of the Ministry of Education and Culture, the Ministry of Employment and the Economy and the Ministry for Foreign Affairs together with representatives from the creative industry sectors.

In 2008 the Ministry of Economy and Employment launched the Development Strategy for the Creative Economy project to cover the period 2008-2011. This aimed at improving the standing of creative professionals in the labour market, promoting entrepreneurship and growth, supporting product development in areas of business that utilise creative know-how and carrying out research.

Alongside these national development initiatives, the Ministry of Economy and Employment created the Network of Regional Creative Industries Developers in 2010. The Network provided support for improving regional networking and for connecting the regional activities to the national level. Interestingly, one of the most popular activities under this programme was cross-sectorial matchmaking and networking for companies.

Considerable emphasis has also been given since about 2007 to developing the CCIs for the contribution they can make to other sectors and businesses both in terms of stimulating spill-over creativity and innovation and through direct inputs and cross-over. This has been most clearly evident in relation to use and development of design but has also involved advertising, marketing communications and animation.

This clear economic focus was not however at the cost of the social and human dimension of the CCS/CCI sector:

"......it is crucial to understand that the values of the creative industries reach far beyond economical aspects. We need to question our basic assumptions of the kind of society we want to live in, and use our imagination and creativity to visualize and design such a society in practice. This also means re-examining our basic values and identity, all central elements of arts and culture. So logical thinking needs to be supplemented with creative skills and know-how, human interaction, and cultural understanding. At the same time we can recognise a shift in people's attitudes: increasing value is placed on the qualitative aspects of our everyday life. Sustainable development, human well-being and ethics are becoming new, value-based factors for competitiveness."[14]

As will already be evident, Finland has a strong track record in policy support both for the cultural and creative industries and a clear commitment to innovation, creativity and internationalisation. There are national policies clearly focussed on intangible value creation, creative entrepreneurship, innovation, design and intellectual property rights, promotion of business and entrepreneurship in the creative industries. These areas have been incorporated into a Policy Programme for Intangible Value Creation (2014-2020).

As mentioned above, Finland's development of CCIs has gone more and more towards a holistic creative economy approach meaning that the focus is now very much also on the added value which the cultural and creative industries can provide to other sectors. In short, the Finnish policy debate is about innovation and intangible value creation focussed on wider multidisciplinary perspectives rather than on simply the culture and creative industries as a sector.

A good example of this was the 2010 Ministry of Education and Culture report 'Creative Economy and Culture in the Innovation Policy'. Within the report various suggestions are made by different authors for strengthening the positioning of CCIs and integrating them into innovation policy and the future economy including:

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[14] Creative Industries Finland (CIF) in cooperation with the Ministry of Education and Culture: Creative Economy - Insights from Finland and Beyond (2011)

- The promotion of user-led and demand-led innovation as a key aim in all publicly-funded innovation projects with emphasis on the participation of companies and actors in the creative industries.
- New instruments for the development of creative industry companies (incubators, venture capital, growth entrepreneurship and internationalisation etc.) taking into account that the traditional instruments designed to support technology companies had not worked very well with regard to culture-based companies.
- Research to better understand user-led and demand-led innovation and especially the role of creative industries in the innovation process, including better understanding of the role of users in product development and testing and how to integrate the user's knowledge and skills into innovation processes.
- Measures to consolidate the cooperation between the Ministry of Education and the Ministry of Employment and the Economy in the definition and implementation of innovation policy with a view to increasing the relative weight of culture and creative industries.
- Local urban area forums to put creative industries in touch with other industrial sectors and organised by higher education institutions, technology parks, business incubators and local authorities. The aim being to strengthen networking between companies operating in different branches of the economy, a prerequisite for successful innovation.

One of the authors lists questions which are amongst the most important ones still being addressed in Finland:

- How can cultural expertise be supported and promoted in atypical sectors through conscious development efforts?
- How can regional, cross-sectoral competence clusters be developed and supported so that new cultural expertise that supports the region's special features becomes rooted and attracts other actors in the long term?
- How can competence and education in the area of cultural production be implemented in connection with strategic development?
- How is the cultural sector taken into consideration as a dimension of comprehensive industrial policy and in strengthening the preconditions for business activities?
- How are the principles of rational strategic planning and self-directive cultural activity brought together?
- How can the Living Lab operating model (which brings together various actors including developers and end-users) be implemented at a regional level as an innovative development platform for the cultural sector?
- How can innovative forms of cooperation (which integrate the public, private and third sector), earnings models and multidisciplinary service concepts be created for the creative industries in connection with public cultural services?

In the spirit of the EU's Lisbon Treaty, Finland's National Programme on the Europe 2020 Strategy sees its approach to intangible value creation as one means of boosting its capacity to deliver innovative products, services and high-growth companies in a rapidly changing environment and as a continuing diversification of industry towards less energy-intensive sectors. The government's Memorandum on Generating Growth and Renewal from Creativity (2012) sought to begin the development of a new business operating environment built on intellectual property rights, the skills required by the creative industries, entrepreneurship and the business sector, on business development services and interaction with the creative economy sector and with the knowledge base of the creative industries.

Finland's IPR Strategy emphasises an environment supporting innovation and creative work supported by legislation. Target areas of the IPR Strategy are knowledge, effectiveness and clarity of Intellectual property rights, competition policy, functional markets for intellectual property rights, an effective IPR management system and international networking.

As in other countries in the region, design is given some priority and often treated as a special part of the CCS/CCI sector. The goal of Finland's current Design Programme is that, by 2020 design will have become part of the core competence of both enterprises and the public sector.[15] The Programme contains twenty-nine recommended actions and aims to strengthen the base for design competence through education and research, to promote 'design ecosystem dynamics' to balance the demand and supply of design competence, to promote effective design in important growth sectors and to establish design competence in the public sector.

In Finland much attention is being given to entrepreneurship with a specific development strategy established for entrepreneurship in the creative industries sector to improve the country's competitiveness, again in the spirit of the EU Lisbon Strategy. The main target is to achieve growth and internationalisation for its creative enterprises. The 2015 strategic objectives of the development of entrepreneurship in the creative industries sector were:

- to create a favourable operating environment for creative companies and encourage innovation. It is understood that CCIs need an operating environment at both regional and national level in which their special characteristics are not a threat but an opportunity and so that new kinds of products and services can be created for various sectors.
- to develop the business operations of creative companies in such a way that even more companies have the opportunity to grow and go international. This requires an ability to identify spearhead companies while investing in the internationalisation of smaller ones.
- to focus on internationally competitive, high-quality products that also respond to customer needs. The aim is to find new forms of funding for product development.
- to create a new cadre of professional producers and managers for the CCI sector able to work in an international environment.

What is happening at the national level is both stimulating, but is also being stimulated by, what is going on at regional and municipal levels. Obviously Helsinki often dominates in this respect but important developments have been happening in the regions.

In Helsinki, an estimated 12.5% of all local companies work in the creative industries, representing 60% of the earnings of creative industries nationally. There is an ambitious Helsinki-Uusimaa Regional Strategy and Programme for 2040, currently in its 2014-2017 phase, which argues that it is the best positioned region to develop and utilise the creative economy including through, for example, its new media and gaming industries which are already actively successful in international markets.

A decade or so ago the development of CCIs as part of policies or programmes also began at a local level. One example, the very successful Creative Tampere (Luova Tampere), was started as a business development programme that ran between 2006 and 2011 with the aim of improving the creative economy in the Tampere region. It worked in three areas: creative industries, innovation and entrepreneurship, and the 'Attractive City'. Half of the programme's projects were related to a creative industries theme. In order to develop business activities within the creative industries, a number of methods were employed including business advice and guidance, consulting, coaching and training,

[15] Ministry of Employment and Economy and Ministry of Education and Culture of Finland: Design Finland - New Growth from Design (2013)

networking, business development financing and project financing, as well as development projects targeted at specific fields. The result seems to have been that almost 700 new businesses started, dozens of development projects within specific fields were implemented, thousands of entrepreneurs coached and trained, as well as development of working models and practices for advising, training and coaching enterprises within the creative industries.

The City of Tampere financed this programme with about 7 million Euros. The city's financial input was used to seed-fund projects, arrange business advice and development services, and for communications and administration. The overall budget for the projects during the six years of the programme's existence has been estimated to be over 35 million Euros which is quite an impressive 'multiplier' figure. The programme was the most wide-reaching regional development programme for the creative economy in Finland, as well as the first, serving as an example for other regional development programmes, both in Finland and abroad.

The six-year Open Tampere Programme (2012-2018) is both a successor of Creative Tampere and a continuation of a small scale programme started in 2010 which was targeted at open innovation and business environments. Tampere is situated 160 kilometres north of Helsinki and after Greater Helsinki (Helsinki, Espoo and Vantaa), it is the biggest Finnish city. The current programme is managed and coordinated by Tampere Region Economic Development Agency Tredea. The programme aims to help bring into existence new growth companies, create internationally substantial business and promote controlled structural changes of traditional industry in such a way that in 2018 Tampere is still the most attractive city for versatile business. Its goals include

- creating new talent-intensive businesses and new jobs and businesses that have growth potential
- supporting controlled structural changes of the ICT-industry and traditional industry and service business know-how
- attracting venture capital investments and new funding solutions
- developing environments for open innovation activities and innovation platforms
- promoting the region's attractiveness, profile and brand

The programme operates through three 'innovation factories'. The factories are spaces, operational models, and communities that permit fast innovation between different operators and creation of new businesses. The three 'innovation factories' are:

- Mediapolis, a centre and network for content production and digital industries, launched in 2014 and offering a variety of production services and opportunities. It is a growing media ecosystem operating on an international scale. Its content production and ICT campus hosts more than thirty companies and other organisations. The single largest group consists of production companies including the Finnish Broadcasting Company (Yle).
- New Factory, an innovation centre and business incubator that connects entrepreneurs, students, researchers, mentors, investors and experts from various fields into value creation through fast innovation and development of start-ups.
- Konela, which has evolved from a technology centre to become a leading innovation company accelerating the growth of local business as well as contributing to national and international know-how and competence. It offers product development and innovation services as well as commercial exploitation of knowledge gained from interdisciplinary research.

As mentioned elsewhere in relation to the use of the EU Agricultural Fund for culture-linked projects, rural areas have not been neglected. A cultural programme for rural areas 2010-2014 entitled 'Countryside of creative contrasts' was developed.

In addition to focussing on provision of cultural services, on rural cultural heritage and the supporting of 'lively and innovative communities', its fourth area of priority was creating a productive operating environment for the creative economy and for cultural entrepreneurship.

During the period up to 2014 there were other significant milestones which have shaped Finland's current CCI and creative economy landscape, two of which were Turku, European City of Culture in 2011 and Helsinki World Design Capital in 2012.

Within the framework of preparations for being European City of Culture and within the Development Programme for Business Growth and Internationalisation in the Creative Industries described above, local leaders in Turku were able, as their counterparts in Tampere also did, to develop initiatives which laid the foundation or contributed significantly to the development of national and replicable initiatives, including Visit Finland's current 'Culture Finland' umbrella programme (see below). These initiatives included creation of a Tourism and Experience Management Cluster under a national Centre of Expertise Programme (2011-13) which involved Turku, Helsinki, Rovaniemi, Savonlinna and Jyvaskyla. This cluster project concentrated mainly on developing cultural tourism from a local perspective and from a national perspective. Linked to it was the kulmat.fi project and site. The site is dedicated to the development of 'cultural business', providing information to tourism, culture and creative industries actors.

Another initiative, which took place under the Tourism and Experience Management Cluster initiative, 'Chain of Culture', was a project carried out in partnership with Helsinki, Mantta and Rovaniemi and created a Quality Programme for Cultural Destinations[16]. These projects developed by Turku Touring, since renamed Visit Turku, took place in the context of a conscious, well-managed and structured effort to create discussion and co-operation between cultural stakeholders and tourism entrepreneurs and organisations. One of the things to emerge from this activity was the critical need for mediators/producers who can make the linkage between cultural content and the tourism stakeholders.

The legacy of this activity in Turku still includes a quarterly forum organised there for cultural stakeholders and tourism organisations. Visit Turku is involved with cultural tourism productisation, marketing and networking issues and participation within different projects in research and education. One area of productisation relates to Finnish lifestyle which as mentioned elsewhere (see below) is at the core of the national strategic definition of cultural tourism.

Within the European Capital of Culture context, Turku with Tallinn, also a European Capital of Culture in 2011, worked jointly on a project focused on service design and productisation of cultural destinations substantially based on marketing. E-learnings based on this project are posted on the site kulmat.fi just mentioned above.

Helsinki World Design Capital 2012 was a huge event. It opened the way to a new Finnish national design programme in 2013. The 'Design Finland Programme - Proposals for Strategies and Actions', already mentioned above, although focussed heavily on industrial design, with the Ministry of Labour taking the lead in the follow-up, did elaborate and establish further in Finland the concept of 'immaterial value creation' which as has already been explained is a central plank of Finland's policy and thinking in relation to the creative economy and CCIs.

Currently there are several organisational players driving Finland's creative economy and CCI development. Apart from the various ministries there are various agencies including Creative Finland ry, a registered association, the Creative Inclusive Finland project and established funding bodies such as Tekes

[16] ESF-funded through the Centre for Economic Development, Transport and Environment of Southwest Finland and administered by Turku Touring.

(see case study). The funding of these actors comes from different sources including EU, national and Nordic funding. The Ministry of Employment and the Economy coordinates the operations of Creative Finland ry with the aim of

- exploiting creative competences in different industries
- generating knowledge about the impacts of intangible value creation on the economy
- creating multidisciplinary communities for business development.

Creative and Inclusive Finland is a coordinating and implementing network for the two Finnish EU Structural Funds Programmes (2014-2020) for developing creative and inclusive competences and is discussed elsewhere in this report.[17]

Tekes is the most important publicly-funded agency for promotion of research, development and innovation in Finland. With what it describes as a broad-based view on innovation, it funds not only technological breakthroughs but also promotes the importance of service-related, design, business, and social innovations. Tekes works with the top innovative companies and research units in Finland financing annually some 1,500 business research and development projects and about 600 public research projects at universities, research institutes and universities of applied sciences. Tekes has been providing funding to the cultural and creative industries from the beginning of Finnish government interest in them. For example, since 2001 Tekes has supported financially the Finnish game industry whose successes include global winners such as Angry Birds, Habbo Hotel and Max Payne. Tekes also offers funding and expert help for development projects when companies seek to improve their competitiveness through use of design.

There is a clear, sophisticated and now well-established understanding in Finland of the creative economy and at the policy and strategy level, understanding and commitment that the CCS/CCIs are a very significant part of the national economy in their own right and are of potential major critical importance in terms of strengthening the competitiveness of other sectors. As hopefully shown above, this is the result of many years of intelligent work and analysis since the late 1990s but in particular in the last decade up to the present. It has been driven by Finnish commitment to R&D and practical, experimental programmes often using EU structural funding.

Since 2014, a new phase of development of the CCI sector has been underway building on previous experience and lessons learnt. Cultural Industries Finland (CIF) which played a key management and networking role in the 2006-14 Programme has served its purpose and has ceased to exist with those who drove it occupying different roles. Some of the functions of CIF have passed to Creative and Inclusive Finland which came into being in 2015 and is managed by Helsinki University of the Arts (Uniarts). Their remit is to manage EU structural funding for the new projects, develop the programme and provide support and coordination. The approach is proactive in encouraging project ideas to develop into funding bids through campaigns, such as a current one entitled 'Do you have a creative idea - Get Jamming!'

What is currently emerging but not yet fully formed is a two-tiered approach in which Creative and Inclusive Finland is dealing with strategic issues and coordination of EU structural money with networking and information being handled by a new 'knowledge centre' or 'observatory'. The latter would work closely to serve the needs of CCS/CCI professionals and businesses and in general push forward the wider creative economy agenda. Not yet with an officially designated name and due to become functional in 2017, the 'knowledge centre/observatory' will be housed in the South East Finland University of

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[17] http://www.uniarts.fi/creativeinclusivefinland, www.cifinland.fi

Applied Arts (XAMK) and will be a major communication facility focusing in particular on networking, cooperative activity and what is being termed the 'fourth sector' i.e. networked organisations.

One of the recommendations resulting from our work (see the regional report) concerns the desirability of a targeted voucher scheme for CCIs specifically in relation to working with tourism businesses. If such a recommendation were taken up, the vouchers could either be a ring-fenced part of an existing scheme or a separately funded new scheme. Voucher schemes can be very effective in raising awareness among companies of potential service providers such as universities or CCIs. Learning to collaborate with service providers may lead to to extended collaboration once sufficient trust has been built using the voucher. The advantage of establishing a voucher scheme specifically linked to CCS/CCIs is that they can often provide close-to-market services, for example through design. The key is ensuring that the request is coming from business-driven demand. The danger is creating a scheme which encourages service-driven supply and is perceived as an extra source of funding and interesting work for CCIs and universities but which does not meet the real needs of the tourism businesses. Voucher schemes exist in Finland and seem to work effectively.

In Finland there is also already very well developed experience of supporting business start-ups and company development through various agencies and schemes like Growth Track. Growth Track ran for five years (2009-2014) and was an Enterprise Finland programme administered by Tekes, the ELY Centres (regional Centres for Economic Development, Transport and the Environment), the National Board of Patents and Registration and other agencies. It targeted SMEs with the aim of stimulating their growth and internationalisation through helping them to tap existing expertise and financing sources. Each business that took part in the scheme was given a 'Growth Pilot' who found for them the right expertise and finance and 'piloted' them through what was available in the system. Since 2014 Growth Track has been absorbed into Team Finland's operations.

There is no intention in the compiling of the eleven country reports and the regional report that in looking at the eleven Northern Dimension countries there should be some kind of 'beauty contest' but Finland has a wealth of experience and research on which to draw and much can be learnt from what they have already explored and achieved.

4. TOURISM IN FINLAND

Finland’s tourism industry has grown and become more international at a faster pace in recent years than other sectors of its economy. It has become an important export sector and provider of employment.

Revenue generated by tourism has been more than 14 billion Euros for several years with incoming tourists spending more than 4 billion Euros, about a third of the total. The number of international tourists doubled during the past 15 year period. Tourism provides employment for an estimated approximately 140,000 people or 5.6% of the workforce. Tourism has accounted for about 2.5% of GDP. Tourism of course also has significant multiplier effects on other sectors, including construction, transport and retail commerce. One estimate is that income from tourism will reach 20 billion Euros by 2025.

A main tourist industry benchmark indicator is the number of overnight stays. The number of overnight stays in Helsinki rose to a new record, almost 3.5 million in 2015. That represented growth of 4.9%, while stays nationwide were down slightly by -0.2% from 2014. On the negative side, what is clear is that visitors from the Russian Federation, traditionally the biggest market, continued to fall in 2015 with the number of stays in Helsinki reduced by 38%, following a fall of 21% in 2014. In 2015 Germany in fact bypassed the Russian Federation to become Finland’s largest foreign market area. The next largest were UK, Sweden, Japan, USA and China. Both recreational and business travel grew in 2015, particularly the leisure travel segment. Cruise ships brought a record 437,000 visitors to Helsinki in 2015. Foreign travellers spent about 1.47 billion Euros in the Helsinki region. Interestingly the travel spend of Chinese visitors exceeded the spend of Russian travellers for the first time.

Over the past decade until 2015 national tourism strategy was based on a 2006 policy document which covered the period up to 2020. The policy document aimed to draw attention to sustainable development in tourism business processes and in the supply of services. It set out detailed measures for promoting sustainable development in tourism and introduced new funding instruments for initiatives supporting green innovation. The subsidies and funding for green innovation in tourism focused on supporting sustainable development in society, enterprises and consumer choice. In addition, key tourism development areas were identified as cultural tourism, nature tourism, health and well-being tourism and adventure tourism. The 2006 policy and vision (updated in 2010) for 2020 was of an attractive country, easy to reach for people travelling for business or pleasure purposes, where companies prosper by offering nature and culture experiences.

The 2006 strategy identified three priority areas. The first was increasing incoming tourism by focusing on international markets, subsequently developed into clear target markets such as Asia and the Russian Federation. The second was related to Finland’s image as a destination, in particular making the country better known internationally. The third related to policies to improve the ‘climate’ for tourism growth through helpful taxation measures and legislation and support for start-ups and business growth.

In 2015, the 2006 national tourism strategy was substituted or supplemented by the new 'Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025 – Achieving More Together’. The ambitious aim of this document is to make Finland the top tourist destination in Northern Europe by 2025. This is to be achieved by increasing cooperation between tourism-related actors, making Finnish products more accessible and well-known and fostering a competitive environment in order to maintain growth and renewal.

The strategic priority areas of the tourism development ‘Roadmap’ are as follows:

- Strengthening theme-based co-operation between tourist centres and networks of tourism enterprises, as well as new openings in product development, sales and marketing

- Developing competitive and comprehensive offerings from the interfaces of tourism and other fields
- Increasing the effectiveness of marketing activities and making the travel services easier to buy
- Creating a competitive operational environment for tourism that supports growth and renewal
- Easy accessibility

A number of different measures will be taken to promote the achievement of the objectives laid out in the 'Roadmap'. The strategic projects supporting growth and renewal for 2015–2018 are being launched first. Funding for them is coming from various sources within the Ministry of Employment and Economy orbit and the areas to be developed include:

- Finrelax - turning Finland into a top country for wellbeing tourism
- Making the Finnish archipelago internationally known
- Finland Stopover - making Finland a leading stopover country (i.e. from Asia)
- Making digital tourism services easy to find and buy
- Creation of a demonstration project targeting sustainable waterway tourism and utilising bioeconomy, cleantech, and digital technology.

Public subsidies for the development of the tourism industry include funding from the European Regional Development Fund (ERDF), European Social Fund (ESF), European Agricultural Fund for Rural Development (EAFRD), Tekes programmes and direct grants provided by ministries. Tourism was made a high-priority sector in the new structural fund and rural programmes launched in 2015.

Public subsidies granted for tourism-related projects between 2007 and 2013 totalled about EUR 500 million. Business subsidies accounted for more than a quarter of this total, one third went to such purposes as product development, while the rest was allocated to the development of services and infrastructure supporting tourism. The public subsidies granted to tourism are roughly equal to the proportion of the tourism cluster of the GDP.

Growth-oriented and networked tourism enterprises with expanding international operations have priority when public subsidies are provided. Funding is also directed at areas providing the tourism industry with stronger operating prerequisites, such as transport connections, improvements in energy-efficiency and the maintenance of national parks and hiking routes.

Implementation of the 'Roadmap' is seen as a collective responsibility through the already-functioning MiniMatka Working Group, although the Ministry of Employment and the Economy is the lead ministry. The MiniMatka Working Group meets several times a year to exchange information at inter-ministerial level.[18]

At the next level down below national strategy, incoming tourism is the responsibility of VisitFinland which operates worldwide and this includes ten marketing representatives posted in key regions and countries. VisitFinland is one part of Finpro, a public organisation consisting of Export Finland, VisitFinland and Invest in Finland. Finpro's remit includes helping Finnish SMEs go international, encouraging foreign direct investment into Finland and promoting travel to Finland. It has representation in 36 Trade Centres in over thirty countries and six offices in Finland. Finpro in turn is part of Team Finland[19]. Team Finland brings together for cooperation all state-funded internationalisation services promoting Finland's external economic relations, country brand, the internationalisation of Finnish

[18] See http://www.tem.fi/en/enterprises/tourism/minimatka_working_group
[19] Team Finland. What is Team Finland? See http://team.finland.fi/public/default.aspx?nodeid=46788&contentlan=2&culture=en-US

companies and foreign investment directed at Finland. The core of the Team Finland network consists of the Ministry of Employment and Economy, the Ministry of Foreign Affairs and the Ministry of Education and Culture, as well as the publicly-funded organisations and overseas networks whose performance they oversee. Team Finland has representative offices in seventy countries.

At regional level the nineteen Finnish Regional Councils are responsible for tourism. Regional Councils provide support for tourism development projects, general marketing, advisory services, training and research. Also working at a regional level are the Centres for Economic Development, Transport and the Environment (ELY Centres). ELY Centres grant support to enterprises for investments, development of business operations and the operating environment and for training and research. They also provide advisory services for tourism enterprises and manage matters related to the local infrastructure in their areas. A sector manager for tourism acts as a national expert on tourism for all ELY Centres. Tekes, mentioned elsewhere in this report (see also the case study) and which provides innovation funding for enterprises, research organisations and providers of public services also supports the tourism sector as part of its broader remit especially in relation to growth-oriented SMEs expanding their international operations.

As with the case of Tekes there are other agencies which can support tourism development as part of a wider brief. Finnvera, a state-owned finance company and Finland's official export credit agency, for example, helps Finnish enterprises in the development of their domestic operations[20]. It also promotes the export and internationalisation of companies with funding such as loans, guarantees and export credit guarantees which can be utilised by enterprises including those in the tourism sector. Another example is Enterprise Finland. Its online service is intended for all enterprises, entrepreneurs and those planning to set up a business providing information on the establishment, growth, development and internationalisation of enterprises.

An important period for Finland’s tourism was between 2007 and 2011 when tourism grew nearly four times faster than the rest of the Finnish economy which with the economic challenges of 2014-2015 explains governmental interest and the high priority now being given to it. It is however a sector quite vulnerable to international conditions and developments. For example while 2012 was a good year with growth at more than four per cent, mainly generated by foreign demand, particularly from the Russian Federation, there was a slight decline in 2013. Since then sanctions and the problems of the rouble have very severely affected Finland’s tourism sector.

As just mentioned, Finland’s economy faced challenges in 2015 leading to fiscal tightening and structural reform. It is particularly within this context that tourism is seen as an increasingly important sector with potential for supporting the creation of new jobs. In the context of current tourism policy, Finland’s tourism comparative strengths are perceived to be in the contrast between its modern culture and its nature-based cultural heritage, the meeting of east and west, technology, the Finnish way of life and creativity. Finland has some more-or-less unique assets, not least Lapland, for which a special policy was issued in 2015. As far as city tourism is concerned, in addition to Helsinki other popular urban tourist destinations include Jyvaskyla, Tampere, Turku, Oulu, Rovaniemi and Porvoo.

As explained above, the national agency for tourism is VisitFinland. One of its core functions is the development of Finland’s demand-oriented products and services offer including ensuring that the products and services experienced by incoming visitors meet visitors' expectations and level of requirement. The products and services themselves are for tourism businesses to develop but VisitFinland

[20] In 2013, for example, Finnerva provided financing to over 3,500 start-up businesses.

helps tourism companies in their work through information provision, creating useful tools and by providing funded priorities and campaigns which play an important catalytic role in product development. The last full review of product development strategies was in 2014.

The current overall product development strategy consists of two Visit Finland long-term national umbrella programmes plus four product development themes. The latter four are 'well-being', 'culture', 'winter' and 'summer'. Of the two umbrella programmes, one is to promote summer activities and is labelled 'Outdoor Finland'. It went into its second phase in 2012 and includes funding from the EU Agricultural Fund. Unlike many countries, Finland's main tourist season is winter and so increasing the tourist flow in summer is a priority.

The other umbrella programme is a development strategy for cultural tourism labelled 'Culture Finland' (CF). Under both these programmes an attempt is made to stimulate, direct and coordinate development work in the country, improve company networking, ensure the quality and 'exportability' of what is developed (the 'Quality 1000' mark) and ensure everything meets the tourism image Finland is wishing to project.

The Culture Finland (CF) Umbrella Programme reflects a consciously-adopted and Finland-specific definition of cultural tourism which is that it is about the specifically Finnish way of life in all its aspects. The target market is similarly defined in an original way as people who are 'modern humanists'. This target market of 'modern humanists' is not offered the traditionally-marketed 'cultural travel destination' but a unique offer of cultural elements - Finnish way of life, heritage and cuisine. CF is funded by the Ministry of Education and Culture and Visit Finland who work closely together with the aim of using the programme to increase cultural tourism within, and to, Finland. The stated goals of the programme are of particular interest in the context of the project of which this report forms a part. They are:

- Increase collaboration between actors within tourism and culture
- Activation of projects and measures, in particular where cultural elements and tourism meet each other
- Creation of added value and income for actors within tourism and culture
- Creation of added value for tourists

The use of networking to combine the resources of actors within the "incoherent"[21] fields of culture and tourism has been identified as crucial. Operative goals also include identifying and highlighting local strengths. Operating within the network, product development, packaging, marketing, and sales enables the elimination of duplication while experts' inputs aim at jointly-specified development.

To increase the effectiveness of the delivery of these goals a regional network of ten coordinators was set up in 2013 to support the umbrella project manager. With these regional coordinators working about two days per month it seems that this model worked well. Unfortunately it has now stopped seemingly because of the funding coming to an end.

Visit Helsinki is the organisation responsible for tourism development specifically related to the capital. The organisation's vision includes:

- Helsinki as one of the most competitive city destinations in the global tourism market and possessing a strong, unified and unique brand
- a year-round, attractive destination for leisure travel

[21] Culture Finland's very accurate adjectival description of the two sectors.

- Helsinki as the leading congress city in the Nordic region and the highest-quality congress city in Europe
- Helsinki as an essential cruise destination in the Baltic Sea.

Helsinki is Finland's most important travel destination, and the importance of tourism to Helsinki's regional economy and business life is clearly understood. It is interesting to note however that culture and creativity are not explicitly mentioned in Visit Helsinki's official vision, strategy, tasks, activities and performance indicators.

5. CCI AND TOURISM SECTOR COOPERATION IN FINLAND

In addition to references in policy documents about CCIs or creative enterprises (as is the term often used in Finland) and the tourism sector working together, there have been practical attempts under certain programmes and through individual projects to encourage CCS/CCI-tourism sector cooperation. A particularly powerful example is of course the Culture Finland Umbrella Programme described above but there are other past and current initiatives.

It is of course probably much easier in a country with a small population to coordinate and implement efficiently national policies and activities but it does seem that Finland has very impressively managed on the basis of solid, ongoing research and development principles to create well developed, long-term policies to underpin both tourism and creative industries development. It has also been very successful in producing not just 'vertical' policies but 'horizontal' ones too. Working cross-sectorially is increasingly becoming part of Finland's national DNA through its strong and visionary policies related to innovation, the creative economy and quality of life and its practical strategies related to SME development, entrepreneurship, investment, education and training.

Finland is already a 'laboratory' in terms of looking at how the CCS/CCIs can work with the tourism sector and we refer to this experience and current Finnish activity in the regional/cross-country report.

6. FINLAND'S BILATERAL AND MULTILATERAL CCS/CCI AND TOURISM COOPERATION WITH OTHER ND COUNTRIES

Finland as an open country and with a lot to offer is an excellent 'team player' and in terms of international cooperation it is a priority in virtually all of its national policies and programmes.

In addition to that general capacity and motivation to cooperate, it has very close working relationships with other Northern Dimension countries. For cultural and other reasons it has a very special relationship with Estonia, not least in relation to tourism and CCIs.

Concrete examples of specific cooperation are too numerous to list but even in tourism, where there could be an element of competition with neighbours, for example attracting tourists from certain markets, it nevertheless is able to engage in 'win-win' joint ventures. One example is the development of a Scandinavian co-operation project 'Chinavia 2020' by the Helsinki City Tourist and Convention Bureau together with Wonderful Copenhagen, Stockholm Visitor Board and Götenborg & Co. The aim was to gain deeper knowledge of China as a market, of the expectations of Chinese visitors and the current readiness of the cities involved to serve them. As a long term goal this project that was developed during 2012 aimed to attract, and succeeded in attracting, a greater number of Chinese visitors to Scandinavia.

Finland for historical, geographical and geopolitical reasons also has very close ties to the Russian Federation and particularly the North West Region. Currently much of the North West Region's cultural and tourism links with the Northern Dimension region involve Finland, usually as the main partner.

Biosphere Reserves: 2

- Archipelago Sea Area (1994)
- North Karelian (1992)

World Heritage Sites: 7

(a) Cultural - 6

- Struve Geodetic Arc (2005)
- Bronze Age Burial Site of Sammallahdenmäki (1999)
- Verla Groundwood and Board Mill (1996)
- Petäjävesi Old Church (1994)
- Fortress of Suomenlinna (1991)
- Old Rauma (1991)

(b) Natural - 1

- Kvarken Archipelago / High Coast (Finland/ Sweden) (2006)

(c) Tentative List - 6

- Saimaa-Pielinen Lake System (2004)
- Paimio Hospital (formerly Paimio Sanatorium) (2004)
- The Holy place of worship of Ukonsaari by the Sami people at Inari (1990)
- The Rock paintings of Astuvansalmi at Ristiina (1990)
- The large Stone Age ruin of Kastelli at Pattijoki (1990)
- The Carvings from historic time at the island of Gaddtarmen (Hauensuoli) (1990)

Intangible Heritage Lists: none

Memory of the World Register: 3 inscriptions

- Skolt Sámi village of Suonjel Suenjel (2015)
- Radzwills' Archives and Niasvizh (Nieśwież) Library Collection (2009) - submitted by Belarus in cooperation with Finland, Lithuania, Poland, Russian Federation and Ukraine
- A.E. Nordenskiöld Collection (1997)

Creative Cities Network: 1

- Helsinki, UNESCO City of Design, (2014)

European Destinations of Excellence (EDEN): 2

- Saimaa Holiday (2010)
- Wild Taiga (2008)

Legal instruments: 25 ratified and 15 non-ratified

- Convention on the Safeguarding of the Intangible Cultural Heritage: acceptance (21 February 2013)
- International Convention against Doping in Sport: acceptance (22 December 2006)
- Convention on the Protection and Promotion of the Diversity of Cultural Expressions: acceptance (18 December 2006)
- Convention on the Protection of the Underwater Cultural Heritage: non-ratified

UNDP HDI - Finland is 24th (2015)

7. CASE STUDIES

7.1 Games and Gamification

The gaming industry is a young industry and growing very healthily in the Northern Dimension region. Globally the industry stood at $93 billion in 2013 with estimated growth to $222 billion in 2015. Finland's $2.7 billion game business continues to grow more rapidly than the rest of the global game business. While global growth was an impressive 9.5% in 2015, in Finland it was even more impressive at 33%. The Finnish game industry grew by about 30 new game studios in 2015.

Norway is also becoming richer through gaming. Between its launch in July 2016 and September of that year, Pokemon, the world's fastest selling app of all time produced for the Norwegian government 1 billion Norwegian krone or the equivalent of 200 Norwegian krone for each and every citizen of the country as a result of its investment in Nintendo.

A major revolution took place when gaming went mobile. Not least a change in its former image of being simply an activity for teenage boys who spent hours in their bedrooms on their computers or on games-playing devices. Now, of course, with a smartphone anyone can access games anywhere. Research on who now plays games is increasingly surprising, not just in numbers but in terms of both gender and age.

Mobile games are the fastest growing game industry segment with revenue increasing from 2013 to 2015 from $13 to $22 billion. Rapid advances in mobile technologies have motivated game designers to create innovative games for diverse purposes and for multiple contexts. Of equal relevance to the tourism and travel industries, games mechanics and game design thinking are being increasingly used in non-gaming contexts – what is now known as gamification.

In Finland there are already established and active games industry representative bodies. This includes the Finnish Game Developers' Association, which as the name suggests, is the national association of Finnish game studios whose mission is to serve as a cooperative body, promoter and trustee of the Finnish game developer studios. There is also the Neogames Finland Association, a membership, non-profit game industry organization. Its mission is to accelerate, coordinate and support the development of the Finnish games cluster. Neogames' members represent all sectors of the game industry from business to education and research. Their aim is to provide a solid and growth-oriented operating environment for the Finnish game industry as a whole. There are other associations which represent a particular segment of the industry, for example, the Serious Gaming Cluster Finland Association.

The Finnish Game Developers Association and Neogames Finland Association have jointly for the last two years organised the Finnish Game Awards which is a gala event recognising the best in various game industry categories. In 2016 there were nine categories of awards. From the point of view of the tourism sector, the most interesting of the game categories is possibly the serious gaming segment. Serious games are a growing industry in themselves. The current industry definition of serious games is that they are games or game-like elements that have a primary purpose other than pure entertainment. In 2016 for the first time at the Finnish Game Awards, the Applied Game Award was given as recognition not only to the award-winning game and its developers, but also to the entire serious gaming sector. The 2016 winner was Money Flow Challenge, the first educational game in Finland targeted at students that helps them understand personal finances.

Given the vitality of the games industry in Finland and elsewhere in the Northern Dimension region and the huge potential of gamification in the tourism sector this is a huge market with potentially spectacular growth potential. It needs however a clear, practical strategy and some incentivising investment plus other stimulation. Gala awards create a lot of interest within industries and more widely and are excellent ways of promoting information and understanding of a sector. What about national or regional awards for tourism gamification ideas, developments and new products both within existing gala award structures such as the Finnish Game Awards but probably more importantly, especially in opening up the huge potential, as a special category in the many well-established travel and tourism gala and similar award competitions and ceremonies?

What else can be done? Are we sure the tourism sector understand the potential of gamification? Are we sure the CCI gaming sector understand its potential in terms of the tourism sector, and if they do, do they understand the needs of, and how to work with, the tourism and travel industries? What is needed is serious business action such as structured encounters between practitioners and players (in all senses!) in both industries, in other words brokered B2B matchmaking relationships.

7.2 Refinery (Jalostamo)

Refinery was set up as a nationwide management consultancy service for the creative sector under the aegis of Finland's Ministry of Employment and Economy. Its aim is to support creative sector people in improving their business operations and making them more profitable. Its clients are usually SMEs, individuals, associations, or communities planning to establish a company in the creative sector.

Its purpose has been to strengthen and develop the business activity competence, product development, and networking skills of creative sector SMEs and to increase the international dimension, competitiveness and long-term performance of their operations.

The service is run by Refinery experts - developers of business operations in the creative sector who have special skills in entrepreneurship, business operations, development of business operations and IPR.

The Refinery Clinics for basic consultation and advice are:

- open for everyone
- normally short e.g. one to one-and-a-half hours
- free of charge
- delivered via by personal meeting, consultation on the telephone, video negotiation

After a Refinery Clinic, the creative sector client is taken to the next stage e.g. a Refinery Consultation. The Refinery Consultation consists of the following features:

- it is an all-day session
- it is company-specific or personal
- it contains content-related advice
- it is discretionary
- previous attendance at a refinery Clinic is obligatory
- it costs € 100 + VAT
- methods used include personal meeting, video negotiation etc

After the Refinery Clinic and Consultation the client is taken to the next stage which is to plug them into the corporate service system and to the productised services of the Centre for Economic Development, Transport and the Environment or to similar development and financing agencies and services.

During the country visit, many positive comments were made about the concept of Refinery/Jalostamo and what it delivers. It is of relevance and potential interest outside of its Finnish context for two reasons. The first is that although Finland at a policy level treats the creative industries as an economic sector that should compete and be treated like any other sector in terms of accessing SME, innovation, export and competivity services it also recognises that the sector has needs related to development and training for which there is a need for a special and specific tool. The second area of potential relevance of the model, or rather its adaptation, could be if such a consultancy service could be set up in countries where it was felt there was a need but targeted specifically at the tourism sector and CCI sector. The idea could be that the consultants providing the services to creative industries sector businesses or start-up (with a tourism dimension) would be from the tourism sector and those providing the services to tourism sector businesses (with a CCIs dimension) would be from the creative industries sector.

7.3 Tekes and Innovation Support

Tekes is the most important publicly-funded organisation in Finland for financing research, development and innovation for companies, research organisations, and public sector service providers. Founded originally in 1983, it is an agency of the Finnish Ministry of Employment and the Economy.

Tekes promotes a broad-based view of innovation - besides funding technological breakthroughs for companies, research organisations, and public sector service providers, it emphasises the significance of service-related, design, business and social innovations. Every year, Tekes finances some 1,500 business research and development projects and about 500 public research projects at universities and other research organisations. In 2014, Tekes provided 550 million Euros for companies' and research organisations' R&D and innovation projects.

Specifically it supports:

- Startups - enterprises under 5 years old aiming at international markets
- SMEs - enterprises that have the enthusiasm and capabilities to develop their business and boost their exports
- Large companies - both large corporations and mid cap companies footnote: Large companies are companies that employ more than 250 people] Mid cap companies are large companies with a maximum turnover of €300 million. seeking to renew themselves and develop alongside SMEs. and research organisations
- Research organisations - research groups seeking to commercialise their research results and cooperate with businesses
- Public services - public service providers, such as municipalities, cities and hospital districts

Testing carried out early enough in cooperation with the customer and the resulting feedback speed up product development and help to focus the product with the genuine needs of the users. For this reason Tekes, also offers loans intended for demos and piloting.

Tekes' most common funding instrument for research is projects carried out by universities, polytechnics and research institutes. The funding is targeted at research projects that create new competence and solutions for identified needs of businesses and industries. Strategic research openings create new high-level competences in areas expected to be important for businesses in the future.

Tekes funding covers generally 60% of the project costs. Companies take part in projects by funding part of the project costs or by participating in the project's steering group. The project results are public. Although it has some priority themes - currently digitalisation, bio-economy, cleantech and health and well-being - funding is offered to any innovative company – also international – operating in Finland. In addition Tekes helps those preparing EU Horizon 2020 bids.

Besides a booming start-up scene, Finnish companies are particularly looking at new digital solutions in different fields because Tekes takes the opportunities presented by digitalisation very seriously and backs them with funding.

One of Tekes' several campaigns focuses on the game industry through game business development funding, one of the reasons why thirty new game studios started up in Finland in 2015. As Tekes boasts, Finland is the best place in the world to develop games and Tekes' funding can share R&D risks and attract private investors. Other campaigns include innovation funding for media developments for projects seeking to transform the media sector in a radical way. Another interesting campaign is trying to connect people up more effectively within the Finnish innovation ecosystem and Tekes set up in 2016 a design competition for a prototype of a digital solution to this issue.

The Finnish National Innovation Strategy emphasises user-driven innovation and demand-driven innovation policies. This strategy was inspired by increasing evidence that demonstrates that the low success rate of traditional producer-research-driven innovation - where up to 70% of new products tend to fail in the commercial market place - is mainly due to the lack of initial potential customer/user involvement in the definition and R&D phases of the products. The Innovation Strategy also identifies public procurement as a demand-driven innovation policy tool which can create opportunities for innovative products and service solutions. In this particular context Tekes funds the planning of public contracts with the aim of renewing services and activities. It targets all contracting authorities and typically covers 50% (depending on type of cost, funding can vary between 25% and 75%) of total project costs. The procurement must however be extensive enough to have an impact on the development of a sector, at least regionally.

Apart from support through the game business development campaign and its media transformation strand, Tekes does not have CCIs as a specific priority or as a theme of a campaign. National organisations in the Northern Dimension countries fulfilling a similar role to Tekes in terms of funding innovation could play a key pragmatic role in bringing the CCIs and tourism businesses together. This could perhaps be stimulated in relation to targeted areas such as gamification development in the tourism sector, mobile app development for museums and heritage objects, VR and Augmented Reality applications for DMOs and so on using a Tekes-style campaign backed by funding.

In the Global Competitiveness Survey 2014–2015 carried out by the World Economic Forum, Finland ranked third of 144 economies in terms of innovation and business sophistication. Finland is also ranked among the top four innovation leaders in Europe in the Innovation Union Scoreboard 2014.

7.4 VR in the Tourism Sector

With the ongoing technology revolution and an increasingly 'visual-communication' world for the younger generations, creating and sharing interactive images and video across various platforms worldwide has never been easier.

A young Finish company ThingLink is working in an area which makes it possible to add contextual information and call-to-action links to images and video so that people can directly interact with the content they see. ThingLink's platform is taking off. Some 3.5 million online publishers, educators, students and marketers around the globe have engaged with the platform. Casual users are drawn to ThingLink's 'freemium' image and video editors while professionals are offered a premium, paid version.

The first technical step was that they started building 'a layer of links on top of everything', so that any visual environment could become 'clickable'. They applied this layer to images, then videos and now are working on VR (virtual reality) because they understand that using VR headsets to experience immersive 360-degree photos is going to be the next step in the evolution of digital photography. ThingLink is positioned at the forefront of this movement. They make 360-degree publishing easy and affordable so that anyone can become a VR content creator. In 2016 after releasing their 360-degree editor, their premium account sales grew by 38 per cent in a month.

With this increasing focus on VR, the company needs to meet demand for suitable images so in 2016 they partnered with 360Cities who have the photographers in order to launch a global 360-degree photo service. Cutting-edge, forward-looking marketers from tourism, fashion, consumer goods, real estate, to mention just some, are keen to start publishing in 360-degree and VR but they simply do not have the time to explore it or to devote to it. ThingLink with its partner 360Cities offers a platform and content so that DMOs of tourism businesses can easily and cost-efficiently create their own customised virtual reality experiences in a matter of hours.

The core of ThingLink's business, its interactive media platform, was very much helped by the Finnish Vigo accelerator programme because when the company was developing its core technology and setting up operations in the USA, Vigo provided funding and without it they could not have expanded their operations there at the pre-revenue stage. Once In the USA the company was able to build both its community of users and SaaS business. [Footnote: Software as a service business intelligence (SaaS BI) is business intelligence delivery from third-party providers over the Internet. Rather than paying for software licensing and hosting an entire business intelligence system onsite, SaaS BI provides a range of business intelligence tools online, letting users either pay a subscription fee or purchase individual services as they need them].

One of the main tourism industry benefits of applying VR systems is the fact that clients can 'sample' a destination beforehand. Destinations can provide some previews for clients to enjoy at fairs, in travel agencies or even in their respective homes. Similarly the VR marketing potential for businesses connected with promotion of attractions, cruises, hospitality packages and so on is huge.

Since 2015 he company Thomas Cook has started using VR in selected travel agencies around Europe to showcase their own hotel properties and airline amenities. They recognise VR as a great way to showcase products to their clients that are based on experiences. In the future, they plan to roll out VR technology in more locations with a more diverse content.

7.5 Slush – Europe's Largest Investor and Start-up Event

Slush is a remarkable gathering which started as a small initiative eight years ago and was built up by a young Finnish entrepreneur, Miki Kuusi. It takes place every November, possibly the worst time to visit Finland, and when there is a lot of slush! It is an 'opportunity event' for Finnish start-ups which has become a major international networking and 'pitching' market-place and takes place at Cable Factory, an impressive renovated industrial building in Helsinki which can host large-scale events. It attracts investors and business 'angels' from all over the world and there is now even a special charter flight that comes from San Francisco. Each year Slush has a theme and in the November 2016 edition, Slush will have a music industry component. It is the largest gathering of small, high tech companies and venture capital investors in Europe.

By 2014 Slush had really taken off. An event that had a few years earlier only attracted 300 people was already drawing some 14,000 people, some 1,400 companies and over seven hundred investors. Slush had become a highly significant promotional showcase for the Finnish government and the media. The variety of guest speakers grew with Slush's increasing success including the founder, Chairman and CEO of Rakuten, Hiroshi Machinate, Skype founding CEO Niklas Zennström, Softbank advisor Taizo Son and Tom Hulme from Google Ventures. it also began to attract top politicians as participants with the Estonian President Toomas Hendrik Ilves, the Finnish Prime Minister Alexander Stubb, the Russian Deputy Prime

Minister Arkady Dvorkovich, the Chinese Vice-Premier Wang Yang and EU Commissioner Jyrki Katainen and others all making appearances.

Aside from the unquestionable PR success, the core aim of the event has been maintained during the past five years. In the year mentioned above, 2014, over 4,000 meetings were held at Slush between investors and companies. This is what makes the huge gathering so important and successful. In 2015 it had 15,000 attendees, 1,700 startups, 800 venture capital investors and 630 journalists from a hundred countries.

The quality and investment capacity of the venture capital investors and 'angels' who come to Helsinki for Slush is most impressive. For example there is Silicon Valley's Accel Partners, who were early investors in Facebook and who are regular attendees, as are BlueRun, who had success with their investment in Paypal. It is thought that in total the investors who attend Slush have some 60 billion Euros of venture capital. The investors listen to entrepreneur and start-up pitches, meet with them one-on-one and watch presentations in their search for a company like Supercell, the Finnish gaming company that has been valued at a staggering 2.2 billion Euros by Japanese investors. Some Finnish companies have already made it into the super-league, in the gaming world apart from Supercell there is also Rovio's Angry Birds but Slush is offering opportunities for the newcomers and smaller players. Apart from gaming, there are many other inventive industries at Slush, including others from the CCI sector and as mentioned above the main Slush theme in 2016 is the music industry.

Slush also has numerous 'side' events which are becoming annual features in the programme. For example in 2016 twenty Nordic creative brands were showcased for international licensing partners in the first Nordic Brand Licensing Market (NBLM) event. This conference within the Slush programme focused on licensing Nordic brands within the creative industries: games, design, animation, film, television, music, publishing and life-style. The aim was to find new markets and business models globally for Nordic brands.

f not necessarily as a main theme, there is no reason why there could not be created a regular platform and sub-theme at Slush for CCI-tourism initiatives and start-ups which could be an important contribution and make an important incremental difference to CCI sector and tourism industry dialogue in a venture capital investment context.

7.6 Finnish Food and Tourism Strategy

Financed by the Ministry of Agriculture and Forestry and Haaga-Helia University of Applied Sciences Finland's Food Tourism Project started in 2012. In the first phase of the project, 2012-2013, fourteen companies were visited and best practices researched. Over 200 students were involved in this first phase gaining very real-life experience which could be used in their dissertation work. The aim of the first phase was to create practical and useful tools for tourism entrepreneurs.

As a result of the research phase the first Finnish Food and Tourism Strategy was developed with several operators during 2014-2015. Visit Finland and the Ministry of Agriculture and Forestry contracted Haaga-Helia University of Applied Sciences to coordinate the strategy. The aims were:

- to develop active, national networks
- to define the roles of the various operators
- to identify shared common goals for the future
- to develop food tourism with the best products
- to communicate widely to all participants, operators and customers about core products and processes

- to organise a national food and tourism competition
- to promote the Food and Tourism Strategy 'Hungry for Finland' especially to tourism operators.

The latter task - promotion and understanding of the Food and Tourism Strategy - is being continued during 2015-2017 through workshops in all the regions of Finland. During this period there will also be a particular focus on developing the food offer of Finnish museums and events. This is being done in partnership with the Finnish Museums Association and the Finland Festivals organisation. In general the current phase has as its priority implementation of the strategy and active productisation.

As part of the project a very practical publication was produced in 2015[22] which covers subject areas such as 'Building Great Experiences for Food Tourism', 'Understanding the Customer', Productising - Remember the Experience Elements' and 'Creating Experiences: Food Tourism Model'.

7.7 Luova Matka (Creative Travel) - 'Culture Creators Go Tourism Programme' 2015-2018

This project brings together the creative industries and tourism operators to develop export-oriented cultural tourism business in a new way. Building on earlier Finnish experience this ESF-funded project, part of a creative skills programme financed by Hame Regional Centre (ELY) goes to the heart of the challenge of making the CCSCCIs respond to the needs and opportunities that exist in the tourism sector. Project-managed by VisitFinland/Finpro the three-year programme officially started in late 2015 and has a budget of 600,000 Euros.

It has various elements within it and is targeted at producers and actors in the CCI sector in order to encourage them to work within tourism to develop new ideas and products and new business models. In particular it is trying to address the problem mentioned several times in the regional and individual country reports of the 'understanding gap' between the CCS/CCI sector and the tourism industry. The problem of different languages and the need for intermediaries to help develop dialogue and cooperation models is central to any progress in harnessing parts of the CCI sector to tourism innovation in a mutually beneficial way.

One key element of the project is therefore development of a cadre of 'producers' who are people who understand both sectors. This is being done through tailor-made training sessions which will cover an understanding of cultural tourism and the market in which it operates, product development and testing, marketing, sales, distribution and pricing, legal and IP issues and so on.

Another element of the project is providing trade study tours for international tour operators.

This project, the experience gained by it and any evaluation during its life-cycle or after its completion is going to be of utmost importance in developing a deeper grasp of how the CCS/CCIs can foster innovation in tourism in the Northern Dimension.

7.8 Visit Finland National Umbrella Programme 'Culture Finland'

Described in the body of this report, the 'Culture Finland' programme is particularly interesting in many contexts, not least that of the emerging phenomenon of 'creative tourism'. It is also an interesting example of how policy and practice are developed in Finland by extensive R&D, careful (if sometimes slow?) appraisal and development of appropriate practical action in the form of serious experimental programmes and projects.

[22] Kristiina Havas and Kristiina Adamsson: Hungry for Finland! - Researching and analysing food tourism in Finland - Best practices and tools (2015)

The development, scope and current nature of creative tourism is described early in this report but VisitFinland's move away from conventional national tourism destination market and its focus on basically selling various forms of the Finnish 'Way of Life' is in the mainstream of what creative tourism is all about.

It is interesting to note that in this, as in other things, Finland may be a real innovator and ahead of its time. In late 2016, Airbnb, announced it was to move in a completely new and expanded direction in practice embracing the creative tourism concept and producing products and services accordingly.

8. COUNTRY CONCLUSIONS AND OBSERVATIONS

There is a struggle going on in many countries to find the right approach to the combined development of creativity, innovation, culture and economy, and on the basis of that, creating the linkages between different economic sectors and business areas. In Finland they have reached an advanced stage of that struggle and their approach is clear. Creativity and innovation are seen at all levels as a central issue in the development of the economy and of the country. The stage Finland has reached is the result of an excellent amount of research, inter-sectoral discussion and widely-targeted awareness measures. In this respect Finland represents an excellent model and has a depth of experience from which others in the Northern Dimension region, even the most successful ones, can learn.

It is impressive what has been going on in Finland in the past decade in terms of general exploration of new approaches to creativity, innovation and entrepreneurship which policies try to link together at all levels. While there may well be much still to be done, one can see that the country is now building on the experience of the 2007-2013 period and from experience in all parts of the country. In the case of the latter, the initiatives that took place in Turku and Tampere mentioned earlier in this report were good examples.

Finland also seems to be at the forefront of joined-up government with seemingly excellent inter-ministerial cooperation across traditional sectors and "silos". For example, creative industries were part of the Ministry of Employment and Economy's and Ministry of Interior's Regional Centre Programme which set up a cultural network in the 25 Finnish regions in 2007. The network was active in developing training and thinking, including in relation to the development of regional specialisation. In similar cross-ministerial fashion, the Ministry of Trade and Industry had a development strategy for entrepreneurship in the creative industries for 2015.

Constraints of time as much as anything have not allowed exhaustive examination of all the relevant elements that can serve as background to developing to a greater degree of innovative synergies between the CCI and tourism sectors on which we focus in the regional report. Similarly not all the relevant players have been mentioned earlier in this report such as the Creative Finland Association which promotes cooperation between the business and culture sectors.

Finland has been addressing seriously the linkage between the CCI and tourism sectors through various past initiatives including the current Culture Finland Umbrella Programme and the Luova Matka project.

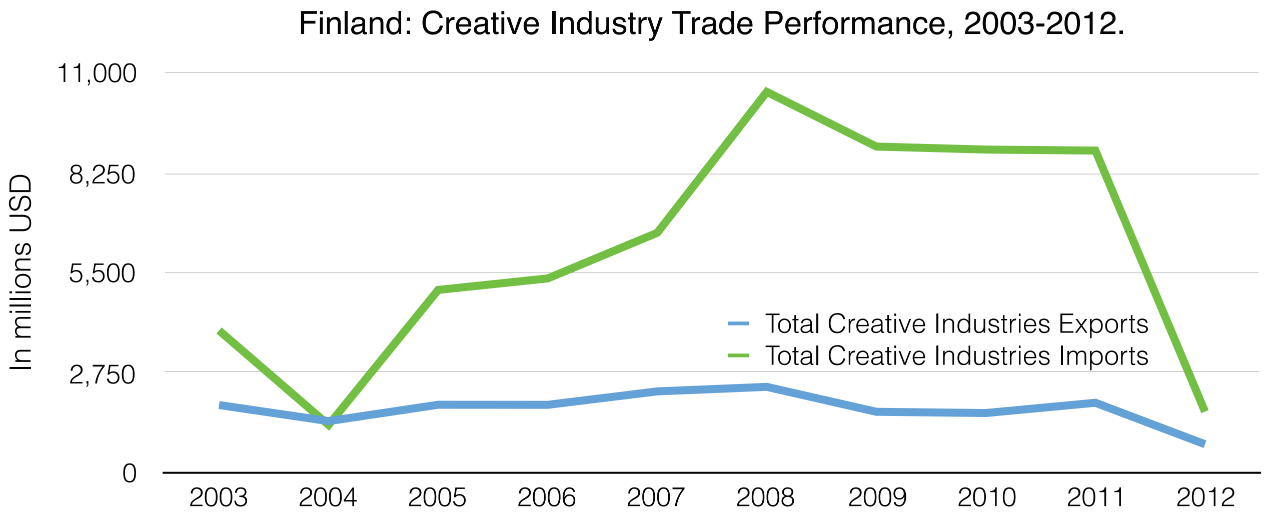
One area, given that games development is already a Finnish strength, that seems to offer huge potential in general but also can have a very specific tourism industry dimension, is games and gamification (see case study) and in particular development of the serious games sector for the tourism industry.

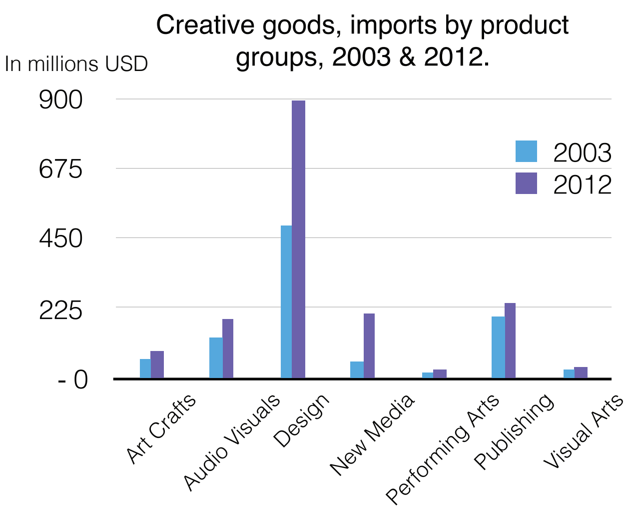
The Finnish Serious Games Industry Report 2016, commissioned by Tekes, suggested that the value of the Finnish serious games sector was nine million Euros in 2015. In 2016 the value is expected to climb to seventeen million Euros. There are approximately 80 serious games companies in Finland but currently the focus seems to be on development of serious games in relation to education and well-being. Targeting the tourism sector also seems to be an obvious priority. The most important sources of support for development of the Finnish serious games sector in relation to tourism would be Tekes and the regional ELY Centres.

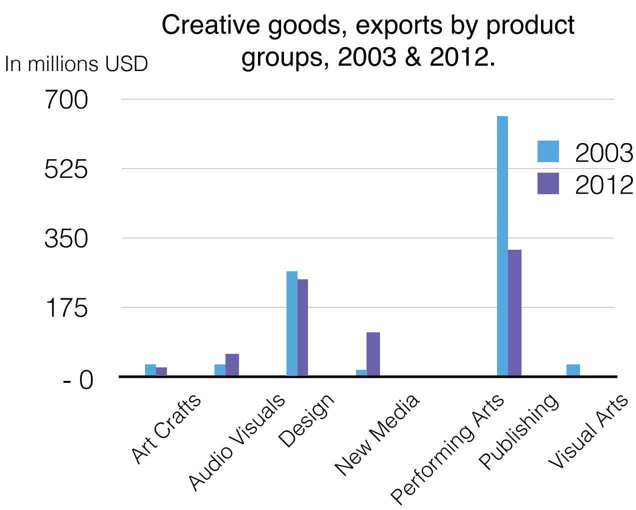
Finally it is worth mentioning Finland's Independence Centenary being celebrated throughout 2017. It has two main themes - civil society and creativity. Under the creativity theme there will be perhaps a chance to further highlight the CCS/CCIs and their potential to contribute more extensively to tourism development, one of Finland's ambitious economic priorities.

Appendix A. Key Facts and Figures

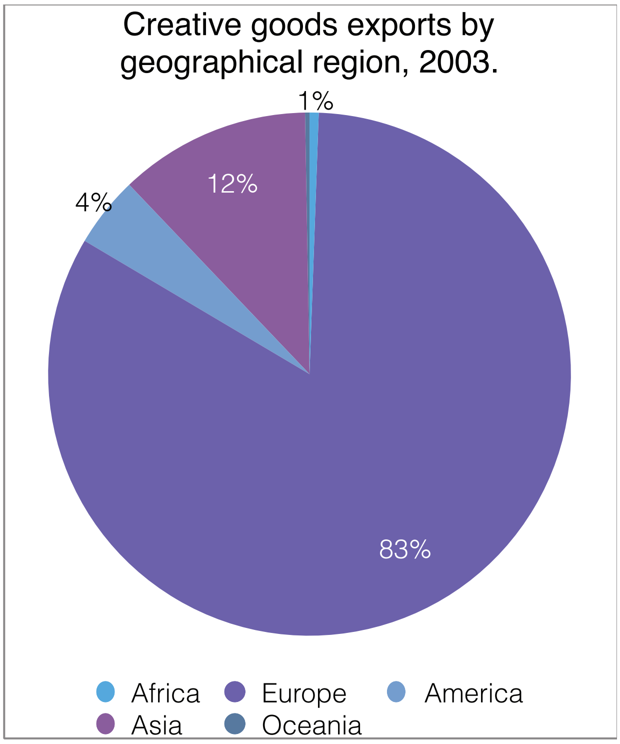
COUNTRY PROFILE - Finland						
Creative Industries Trade Performance, 2003 and 2012						
Finland	2003			2012		
	Value (in Million US$)			Value (in Million US$)		
	Exports	Imports	Balance	Exports	Imports	Balance
All Creative Industries	1,855.19	3,909.74	2,054.55	774.80	1,673.30	898.50
All Creative Goods	1,042.58	966.29	76.29	774.80	1,673.30	898.50
All Creatives Services	812.61	2,943.45	2,130.84	-00	-00	0.00

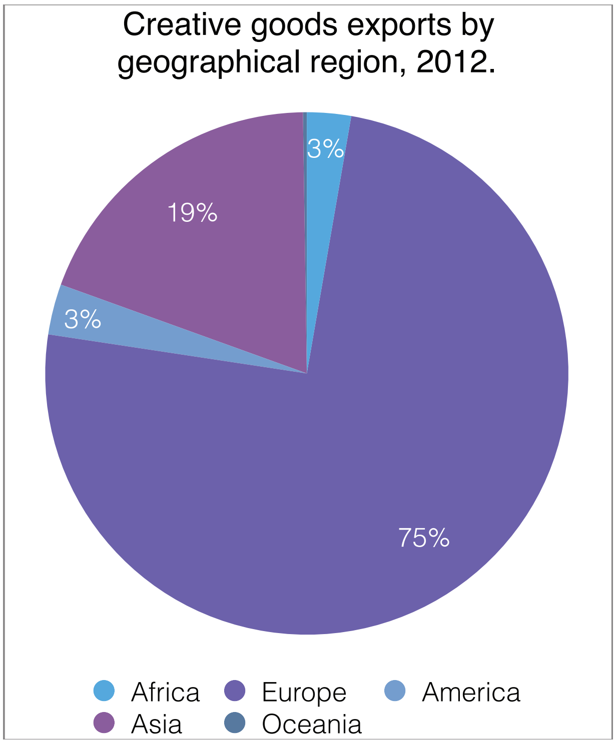






Finland's creative industries exports stood at $774,8 million in 2012 after a decline in 2011. Publishing (newspaper and books) is a leading sector which stood at $321 million dollars in 2012 followed by design (interior design and fashion) which reached $246 million. New media and audio visuals combined are the group that grew the most. The Ministry of Employment and the Economy has a Government Programme to boost business and entrepreneurship in creative industries.





TOP 10 EXPORT PARTNERS FOR CREATIVE GOODS, 2003 AND 2012

	2003				2012			
	Values in Million US $				Values in Million US $			
Rank	Country	Exports	Imports	Balance	Country	Exports	Imports	Balance
1	Russian Federation	157.26	23.23	134.03	Sweden	176.00	253.78	77.78
2	Sweden	149.42	143.87	5.54	Russian Federation	135.71	24.32	111.38
3	United Kingdom	128.39	65.36	63.03	Norway	48.72	14.91	33.81
4	Denmark	65.40	48.93	16.48	Estonia	36.58	83.73	47.14
5	Germany	62.54	109.47	46.93	Germany	35.87	119.05	83.18
6	Norway	53.19	17.65	35.55	Turkey	33.19	13.27	19.92
7	Spain	43.30	13.98	29.33	United Kingdom	28.73	50.36	21.63
8	France	41.63	19.04	22.60	Denmark	28.62	67.62	39.00
9	Estonia	35.36	38.56	3.20	Spain	19.75	10.44	9.31
10	Netherlands	32.67	52.52	19.86	France	17.36	51.21	33.85

Finland's main creative goods destinations by region are Europe (75 per cent), Asia (19 per cent), Africa (3 per cent) and America (3 per cent). Top 5 creative goods export partners are Sweden, Russian Federation, Norway, Estonia and Germany.

Source: http://unctad.org/en/PublicationsLibrary/webditcted2016d5_en.pdf

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