

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



Country Report – Sweden



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CONTENTS

DISCLAIMERS	2
LIST OF ABBREVIATIONS	4
1. INTRODUCTION AND KEY COUNTRY POINTS	5
2. BASIC COUNTRY INFORMATION	12
3. CULTURAL AND CREATIVE SECTORS/CCIS IN SWEDEN	14
3.1 DIFFERENTIATING CULTURAL INDUSTRIES FROM OTHER INDUSTRIES – A SWEDISH APPROACH.....	15
3.2 REGIONAL WORK ON CULTURAL INDUSTRIES.....	17
3.3 INTER-MINISTERIAL COOPERATION.....	19
4. TOURISM SECTOR IN SWEDEN	20
4.1 EFFECTS OF TOURISM ON THE ECONOMY.....	21
5. CCI AND TOURISM SECTOR COOPERATION IN SWEDEN	22
6. SWEDEN'S BILATERAL AND MULTILATERAL CCS/CCI AND TOURISM COOPERATION	24
7. CASE STUDIES	26
7.1 SUSTAINABLE DESTINATION DEVELOPMENT (PRODUCTION AND VALUE-CHAIN MANAGEMENT)	26
7.2 INSIDE THE BLACK-BOX: INNOVATIONS IN THE HOSPITALITY SECTOR	27
7.3 THE WHYS OR WHY NOTS OF VISITING A PLACE: THE SIGNIFICANCE OF THE INFORMATION SENT OUT THAT DETERMINES THE SUCCESS OF AN ATTRACTION	27
7.4 TO INCREASE INTEREST IN SWEDISH SPORTS EVENTS.....	28
7.5 WHEN IS FOOD WORTH A JOURNEY? A STUDY OF CULINARY TOURISM.....	29
7.6 THE SHELLFISH JOURNEY.....	29
7.7 "IN ARN'S FOOTSTEPS"	31
8. COUNTRY CONCLUSIONS AND OBSERVATIONS	33
8.1 GENERAL CONCLUSION	33
8.2 COUNTRY CONCLUSIONS	33
APPENDIX A. KEY FACTS AND FIGURES.....	35
APPENDIX B. KEY DOCUMENTS AND SOURCES.....	37

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

LIST OF ABBREVIATIONS

Acronym/abbreviation	Meaning
ACSIS	Advanced Cultural Studies Institute of Sweden
CCE	Centre for Cultural Economy
CCI	Cultural and Creative Industry
CCS	Cultural and Creative Sectors
EPA	Enlarged Partial Agreement
ETOUR	European Tourism Research Institute
EU	European Union
GBV	“Glesbygdverket” (National Rural Development Agency)
GDP	Gross Domestic Product
HRF	Hotel and Restaurant Workers’ Union
IT	Information Technology
ITPS	International Training Programmes Sweden
IUC	Industrial Development Centres
ND	Northern Dimension
NDPC	Northern Dimension Partnership on Culture
OECD	Organisation for Economic Co-operation and Development
OTAs	Online Travel Agencies
RUP	Regional Development Program
SCB	Statistics Sweden
SEK	Swedish Krone
SME	Small and Medium Enterprises
TSA	Tourism Satellite Account
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	World Tourism Organization

1. INTRODUCTION AND KEY COUNTRY 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 Leader¹. 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?

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.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

- 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?
- 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 country². 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 Denmark, Norway and Sweden. 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 OTAs³ 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' tourism⁴, often with overlaps with other forms of tourism e.g. adventure tourism, health and well-being tourism and so on⁵. 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.

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'.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

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 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 confusion⁶.

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 OTAs⁷ 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 etc.

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

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

- Festivals - a major element in event tourism and place branding
- Crafts and antiques - as part of shopping and souvenirs
- Architecture - tourism industry's use of 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 question is really could, and should there, be more interaction? Is there either 'market failure' or under-utilised potential/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 and the development of shared interests between the CCI and Tourism sectors? Are there particular tourism sub-sectors and CCI sub-sectors more suited for innovative interaction and more able to produce new cooperation models and paradigms? If there is 'market failure' or under-utilised potential/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 intervention. Tourism and the CCIs share many characteristics. They are fragmented, dynamic, numerically dominated by SMEs and micro-businesses, 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 CCI 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 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 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 but the fact that the concept of the CCIs is still relatively new (even if one traces it back to the 1990s) 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 greatly exacerbated by the problem of poorly 'joined-up' government/administration which particularly affects areas which need to be politically and economically managed in a 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. 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 responsible for their own development?

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

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. Traditionally policy-makers 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. The CCIs have not been noticeably lobbying for more engagement with the tourism industry and 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 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 it 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 such as design, one can see that in one ND country it has about 25 defined 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'. If progress is to be achieved there is a need to be selective, realistically focussed and take a segmental approach if trying to develop effective models and paradigms for CCI-Tourism cooperation and interaction.

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. 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 CCI involvement. Cultural routes and trails open up 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. Rural tourism's special challenges - information, communication and access - are also fields of opportunity for CCIs. Events tourism, a priority in many of the ND countries, is still not a saturated area and new festivals of all types are mushrooming in the region and are natural meeting grounds for the CCIs and tourism development. In the case of festivals, the CCIs could be encouraged to provide the linkage and continuity to festivals and events that are 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? CCIs as linkage or continuity is already happening in some places.

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 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 also needed. Awareness of the potential of the CCI-tourism relationship needs to be actively 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

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

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 some new and practical bridges. As mentioned earlier, there is little evidence of a common language and 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 innovation or SME funding schemes which are very general in nature. If real progress is going to be made in drawing the CCI and tourism sectors closer together 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 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’⁹ or ‘Gettysation’¹⁰. 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.¹¹

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

⁸ A particularly interesting project, Luova Matka, is currently taking place in Finland which is addressing this issue.

⁹ 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.

¹⁰ A phenomenon sometimes referred to as ‘Macdonaldisation’

¹¹ OECD (2014), *Tourism and the Creative Economy*, OECD Publishing, Paris.

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Country Report – Sweden

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

Key points for Sweden include:

- Sweden has no single official definition of the creative industries. The most commonly used approach originates with The Knowledge Foundation (KK-stiftelsen) and includes "architecture, computer and TV games, design, film, photography, the arts, literature, the media, market communication, fashion, music, cuisine, scenic arts, tourism and experience based learning".
- At the regional level there is ongoing development work to promote regional growth in the best way. Here the "experience industry", creative/cultural industries and culture are important parts.
- Culture is a cross-cutting sector in a large number of central current programmes such as:
 - Attractiveness and a good living environment
 - Creativity
 - Entrepreneurship and running a business
 - Democracy
 - Diversity
 - Public health

2. BASIC COUNTRY INFORMATION

While many of its institutions are much older, Swedish cultural policy in the modern sense emerged between the 1920s and the 1970s, was consolidated around 1974, and has remained comparatively stable until present times. The cultural policy shaped during the 20th century, is still largely in place, in spite of an increasing tendency to change, especially on the local and regional levels. Cultural education, public museums, concert halls and public libraries were favoured areas of cultural policy in the early 20th century, typically with substantial contributions from private patrons and voluntary work. In the 1930s, the democratic welfare state began to evolve with an increasing government involvement in arts and culture. During the same period, the efforts in popular cultural education made by movements such as the Labour Movement, the Temperance Movement and the Free Church Movement solidified into government-funded organizations.

Other important institutions were already old at that time, often having been inspired by French, German or Italian models. Examples of such organizations are The Royal Opera, The Royal Dramatic Theatre, The Royal Library, The National Archives and The National Heritage Board. Most of these organizations had been founded by the monarchy and have remained under government control, even though private sponsors and donors have also played a role in funding them. From the 1930s, the main feature of Swedish cultural policy has been an emphasis on equal access to quality culture. One initiative typical of the early welfare state period was the national touring theatre company Riksteatern, created in 1934 and organized according to a corporative model combining the ideals of state centralism and membership-based popular movement organizations. In the 1950s and 1960s, Social Democratic governments continued to expand the state to create an all-encompassing welfare system. Established cultural institutions were modernized and new ones were created, e.g. touring institutions for exhibitions and music, the Film Institute, municipal music schools, and colleges for art and drama.

Another example is The Author's Fund, created in 1954 to distribute government grants to writers, established as a support system based in cultural policy and a compensation for the right of public libraries to lend out books. In the 1960s, political activity in cultural policy debates rose dramatically, resulting in the first general cultural policy objectives in the Government Bill on Culture of 1974. The democratic welfare-state model of cultural policy was now institutionalized. A new government agency, the Swedish Arts Council was also created.

While these objectives were an initiative of the national government, the most significant result may have been the substantial strengthening of regional and municipal resources for the production and distribution of quality culture. In fixed prices, public cultural expenditure rose from about SEK 8 billion in 1973 to about 16 billion in 2000.

The Ministry of Culture was separated from the Ministry of Education in 1991, but many participatory cultural activities are still the responsibility of the Ministry of Education, as is artistic education. The two fields are in other words still closely linked, and the ministries were briefly reunited from 2004–2006.

In the 1990s and 2000s, the most significant changes in the general conditions for cultural policy have been results of increasing regionalization, globalization and new media; in particular, the increased movements of people, cultural products and cultural influences across national borders have been the main influences on developments in arts and culture, as well as in cultural policy. The main cultural policy responses to these changes can be summed up as a new perspective on Sweden as a multicultural society, a more positive perspective on the creative industries and new efforts to transfer policy-making powers from the national to the regional level.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

In 2009, a new Government Bill on Cultural Policy was passed by parliament setting new objectives for Swedish cultural policy, but also proposing a new and more decentralized organization for government supports of arts and culture¹².

Increasing private funding for culture was an objective that was emphasized especially by the non-socialist government from 2006–2014. In the 2000s, regional governments have become increasingly involved in Swedish cultural policy, both in creating their own cultural policies and in distributing funding from the national budget. As a result of the Government Bill on Cultural Policy of 2009, a significant part of the national funding for culture was transferred to regional governments. Under this model – known as the Cultural Cooperation Model – the Swedish Arts Council acts as a representative of the national government in approving the Cultural Policy Plans of the regional governments for national funding. In the making of their Cultural Policy Plans, regional governments are also obligated to consult with representatives of cultural institutions, professionals and civil society in their respective regions. In 2011, this procedure was tested in five regions (West Sweden, Skåne, Norrbotten, Gotland and Halland). Eleven more regions have followed during 2012, leaving Stockholm County as the only region in which the model is yet to be implemented. In sharp contrast to the political stability that has marked Sweden since the middle of the 20th century, the election of 2014 resulted in a parliament with an unclear majority situation. In December 2014, the Government Bill on the National Budget – including a number of reforms relevant to cultural policy – was voted down by parliament, which has resulted in the government implementing for 2015 the budget proposed by the opposition.

¹² The Government of Sweden, "Tid för kultur" (Govt. 2009/10:3), 2009.

3. CULTURAL AND CREATIVE SECTORS/CCIS IN SWEDEN

Sweden has no single official definition of the creative industries. The most commonly used approach originates with The Knowledge Foundation (KK-stiftelsen) and includes "architecture, computer and TV games, design, film, photography, the arts, literature, the media, market communication, fashion, music, cuisine, scenic arts, tourism and experience based learning". Since 2007 the Ministry of Culture and the Ministry of Enterprise, Energy and Communications cooperate on issues regarding cultural and creative industries. The aim is to develop opportunities for the cultural and creative industries. The Minister for Culture and the Minister for Enterprise, Energy and Communications have hosted seminars and dialogues at which representatives of both culture and business met to talk about what is needed to develop the cultural and creative industries. This has resulted in an action plan for cultural and creative industries involving the investment of SEK 13 million.

A Council for Cultural and Creative Industries has been appointed to support government ministries in their work on these issues. It appears that support for cultural and creative industries will become an increasingly important focus for cultural policy on the national and, especially, on the regional and local levels of government.

As in the other Nordic countries, Swedish authorities have not traditionally had a specific policy towards such industries. However, schemes have for a long time existed to support quality production in the areas of books and art periodicals, music and film. These support systems play an important role in Swedish cultural policy. For example:

- government support to literature, including publishing books and periodicals, subsidies for libraries to purchase books and the promotion of reading;
- and state subsidies for film production, promotion and distribution.

In 2002, the VAT rate for books was reduced from 25 to 6%. The chief motive was the promotion of reading generally. Results point to lower retail prices and increased reading of fiction literature though mainly within groups already reading books.

The Interactive Institute is a governmental initiative financing projects in creative virtual thinking, as proposed by artists, scholars, and partners within the commercial and industrial sectors. In later years, regional development plans have, in a few cases, included the establishment of Industrial Development Centres (IUC) and support and cooperation with the culture industries.

Much more than on the national level, cultural and creative industries tends to be in focus on the local, and to some extent on the regional, level. Several Swedish cities and less populated municipalities have made efforts to use culture as a means to revive the local economy and make the municipality a more attractive place to live or invest. Such efforts are often guided by the notion of cultural planning, focusing on mapping and making use of all of the cultural resources available in the local cultural life. Especially noted for such efforts are, for example, Malmö City and the regional government of South Småland.

The Swedish Agency for Growth Policy Analysis has been commissioned to propose a definition of "creative industries" based on existing statistics¹³. Taking as its starting point the study from UNESCO and Eurostat, the Swedish Agency for Growth Policy Analysis proposes the concept of "cultural industries". By using established studies to more clearly and precisely define terms, it becomes relatively easy to adapt Swedish statistics to the definitions which in all probability will be used internationally. This definition

¹³The Swedish Agency for Growth Policy Analysis - Creative Industries in Swedish statistics
https://www.tillvaxtanalys.se/download/18.1d7fbce414d2f83fc76829d9/1431416801718/WP_PM_2009_02_en.pdf

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

makes it possible to develop measures based on existing statistics for levels of value added, salary totals and employment data as well as the number of active companies. The term proposed can also be used in supplementary studies to analyse how "cultural industries" on their own or in interaction with other industries can contribute to sustainable growth.

The term proposed "Cultural industries" has the merit of being anchored in "The 2009 UNESCO Framework for cultural statistics" and in the French Ministry of Culture's report to Eurostat. Both these reports provide arguments for identifying cultural industries from three different approaches: industrial classification, vocational classification and product classification.

Cultural industries work mainly with those parts of "use value" which are not purely technically functional, values which in this report are referred to as cultural values. These can be described as social, aesthetic, historical, spiritual, symbolic and authentic: values which are intimately connected with the definition of culture from an anthropological perspective, namely the forms by which people choose and build their lives. How individuals consume and allocate time to different activities are parts of this. The definition chosen for cultural industries can be applied to existing Swedish register statistics, albeit with the shortcomings they have. The starting point, however, has been the most recent revision of the industrial classification since this has better disaggregation for the services sector. The disadvantage, however, is that analysis over time cannot be done without a more detailed comparison of the amount of information lost between the earlier industrial classification system and the new one.

Their proposal can be summarized in the following points:

- ⇒ Cultural industries instead of creative industries should be used as the term.
- ⇒ Cultural industries can be defined in existing statistics
- ⇒ A Swedish definition which can be easily adapted to match later harmonization requirements for international comparisons.
- ⇒ Indicators for production of cultural values in the whole economy can and should be made based on the "trident" approach.

It appears that the definition can be used for the following purposes:

1. An estimate of "cultural industries in the economy (not the same as cultural satellite accounts) is another way of estimating culture in the national accounts
2. Regional distribution of cultural industries in the economy
3. Cultural industries by employees in these industries, and in cultural occupations outside these industries.

In the first instance what is interesting in a measure of a specific industrial branch is how large this is in relation to other industrial branches, how it changes over time and its interaction with other industries. Cultural industries are important building blocks in regional development plans. The definition proposed can serve as an instrument or mapping tool when making comparisons between regions over what "resources" in terms of cultural value producers are available in a region, and which can be mobilized for different purposes, such as promoting sustainable growth.

3.1 Differentiating cultural industries from other industries – a Swedish approach

There is a substantial volume of literature and debate concerning different methods of differentiating between creative industries or cultural industries. The French report to Eurostat provides a concise summary of different attributes proposed for such a sector:

- *Creativity* – Activities are typified by new creations.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

- *Copyright* – Defining a sector based on industrial activities related to the use of copyright materials.
- *Use value* – The usability of a good from the creative sector is typified more by "ideas" than technical (functional) qualities
- *Production methods* – High initial cost and relatively low marginal costs are described as being typical of many cultural products. A song recorded digitally is easy to copy at zero cost. Apart from this, it has been maintained that contracts and business agreements between players in these industries are particularly difficult to formulate.

Criticism can be made of each point where it denotes a specific sector. In all activities generating knowledge, where knowledge can be codified, handbooks written, there are high initial costs connected with low marginal costs. Contractual disputes in creative industries are no more difficult than other activities working on a project basis. It is doubtful that the uncertainty of business projects in "creative industries" would be greater. There are always a certain number of businesses where entrepreneurs have considered conditions to be more positive than they actually turn out to be. It has also been argued that one must look at the "totality" of these different aspects as they show the differences between "creative industries" and other industries. How such a "whole" should be determined remains unclear.

It is the Swedish view that two conditions are interesting when it comes to products to be defined as "creative". One is that their "use value" differs from such values for other products. The second condition is connected with the difficulties for producers to appropriate parts of the economic value since positive externalities are often involved.

The work of ITPS on creative industries¹⁴ shows it is important to minimise the scope of arbitrariness in the formulation of a definition. Adopting an internationally recognized definition is preferable to constructing a national equivalent. The two proposals above can be said to be in line with a large number of reports dealing with the question of creative and cultural industries. Both reports fall into the category "Cultural Industries" and there is a large degree of correspondence between these two reports on what should make up these cultural industries. The differences between the UNESCO and Eurostat reports mean that it has been considered most appropriate in the current situation to draw up a Swedish definition for Swedish conditions.

There is a tradition in Sweden similar to that in other countries to attribute certain activities to the cultural area, one example being architecture. Some years ago the Ministry of Culture established the "National Council for Architecture, Form and Design" to develop policy in the area. In contrast to UNESCO's assessment, it considers that "architecture" is an activity that should be included in cultural industries.

Developing computer programs (software) may be said to be "text" and thus culturally related. Digital technology is a generic technology that can be applied in most areas, and could thus dominate other more traditional cultural industries. In contrast to UNESCO's definition which includes production of software in its expanded definition, the Swedish definitions recommends that everything in IT be excluded from cultural industries except for specific industries with final products that are bearers of cultural product values. Virtually all reports on cultural industries are unanimous in viewing interactive games (computer games) as such products. An overall view of IT industries is in addition produced today and catches instead the dynamics concerning these. One exception applies to activities that produce interactive games/computer games which are usually regarded as being part of cultural industry.

¹⁴ Ibid 10

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

On the other hand, Sweden shares UNESCO's view that "handicrafts" should be included in the cultural industries sector. Handicrafts usually state that they are working in a tradition which is related to such "cultural product values" as mentioned above. Handicrafts are not defined in the industrial classification, but can be identified in the vocational classification through the definition below:

"... requires knowledge of the materials used and covers a substantial proportion of the phases involved in the production of the final product"¹⁵.

One problem is how to view advertising and marketing. The Eurostat report includes these. At present the proposal is that the product "Advertising design and concept development" be included, but as this is also integrated in larger advertising agencies, it would probably be necessary to include the whole industrial branch. In this case the proportion of employment and income in this industry branch should be examined.

Another problem is how to regard education. Purely commercial education institutions in the area should be included, but institutions such as university colleges should be further discussed.

Finally, the judgment can be made that it is the mapping of the creation and production of "cultural value" which is of interest in the first instance, and this could be used as a basis for further analysis. Distribution, for example in retailing or via the Internet, and mass production manufacturing (book printing) are all examples of industries that can dominate cultural core activities. It is possible that activities such as book printing should be included, particularly for comparisons with other countries.

3.2 Regional work on cultural industries

At the regional level in Sweden there is ongoing development work to promote regional growth in the best way¹⁶. Here the "experience industry", creative/cultural industries and culture are important parts. Each region draws up a Regional Development Program (RUP). According to the Ordinance (2007:713) on regional growth, there should be an RUP for each county. The aim of RUP is that it should state how the region can promote good sustainable development from economic, environmental and social perspectives. The programmes should also contain a strategy on how their goals are to be achieved.

During the years 2007 and 2008 a cooperation project was carried out between the Swedish National Heritage Board, the National Archives, the Swedish Arts Council, Nutek, the Swedish Institute for Growth Policy Studies, and the Swedish Association of Local Authorities and Regions. The aim was to analyse regional development programmes and strategies from cultural and cultural heritage perspectives. The project KRUS, (Kultur i Regionala Utvecklings Strategier) (Culture in Regional Development Strategies), has amongst other things studied how culture can be used more effectively as a resource for regional development and growth.

¹⁵ Artisanal products are those produced by artisans, either completely by hand, or with the help of hand tools or even mechanical means, as long as the direct manual contribution of the artisan remains the most substantial component of the finished product. These are produced without restriction in terms of quantity and using raw materials from sustainable resources. The special nature of artisanal products derives from their distinctive features, which can be utilitarian, aesthetic, artistic, creative, culturally attached, decorative, functional, traditional, religiously and socially symbolic and significant.

(definition adopted by the UNESCO/ITC Symposium "Crafts and the international market: trade and customs codification" - Manila, 6-8 October 1997) / Source: www.unesco.org

¹⁶ Ministry of Culture, National Strategy for Sustainable Regional Growth and Attractiveness <http://www.government.se/information-material/2016/04/swedens-national-strategy-for-sustainable-regional-growth-and-attractiveness-20152020---short-version/>

Country Report – Sweden

The documents studied were regional development programmes, regional growth programs (RTP), large regional structural fund programs, regional cultural and cultural environment programs, as well as other documents focusing on regional development and growth¹⁷.

Based on the programmes studied and their strategies, the RTMP KRUS project drew the following conclusions:

- The term culture is seldom defined, but culture is generally regarded as a positive development factor.
- Cultural environment and cultural heritage may be said to be of importance for development and growth, whilst the cultural infrastructure in Fine Arts, museums and libraries is not emphasised as much.
- The role and value of culture in relation to sustainable growth is weakly defined.

Culture is often connected to other general terms in the current programmes such as:

- Attractiveness and a good living environment
- Creativity
- Entrepreneurship and running a business
- Democracy
- Diversity
- Public health

A general conclusion is that RUPs largely illustrate the role of culture and its potential for promoting regional growth, but often lack connections to more concrete strategies. But there is one exception. *Östergötland, Örebro, Västmanland, Uppsala, Sörmland* and *Södra Småland* are involved in the project *KRUT* (Creative Development). This project which was coordinated by *The Regional Development Council of Östsam*, received during 2008 structural funds from the EU to map in the first phase creative industries and disseminate knowledge between counties, and together with the business sector further develop the area.

The goal of the KRUT project is to create sustainable development in the creative sector and thereby strengthen the sector's position in society. In order to achieve this, the region's creative sector was mapped. Disseminating knowledge about the sector, establishing support, creating networks and in different ways providing better conditions for entrepreneurship were other methods used in the KRUT project.

The KNOWLEDGE Foundation's FUNK model which has been used for the experience industry, is also regarded as a functioning model in the KRUT project.

The National Rural Development Agency (Glesbygdverket) published its report Spring 2009 "Kultur kan göra skillnad (Culture can make a difference)". A number of examples are reported here on how individual municipalities are working with culture. The report is based on a large number of interviews and should be regarded as a contribution to mapping and analysing the importance of culture for the development of society and the promotion of entrepreneurship in rural and sparsely populated areas. According to the report from the Commission on Culture, culture can be given two definitions: Either culture as an artistic activity such as literature, arts, theatre, dance and film, or culture as a way of life, namely the anthropological concept of culture. GBV's report and mapping is based on a narrower definition which is also more clearly linked to cultural policy and cultural activities of public institutions. However, the

¹⁷ Regional sustainable development in Sweden-Developing methods and processes
<http://www.naturvardsverket.se/Documents/publikationer/620-8176-4.pdf>

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

authors point out from the perspective of local development and entrepreneurship, the term "culture" should be broadened to encompass the experience industry, tourism, entertainment and business life in general.

3.3 Inter-ministerial cooperation

Cooperation between authorities on a greater scale was initiated by the Government on 20 June 2007. Some 20 authorities were asked to strengthen their cooperation to promote sustainable regional growth by working in agency groups focusing on different themes.

The commission should be carried out in accordance with the priorities determined in the "National strategy for regional competitiveness, entrepreneurship and employment" 2007-2013. Cooperation covers i.a. the sub-group innovation and renewal, which includes the area of creative industries. In addition to working with regional dialogue, the working group on creative industries has chosen to map regional initiatives in the area.

A number of regions and municipalities have worked on mapping the creative sector, but also worked with support measures such as creating networks, stimulating entrepreneurship etc. The ambitions of the regions in the area are to some extent reflected in the regional development programmes, but to achieve the aim of a national overview of the area, better material is necessary. A survey questionnaire has been carried out. The idea is that regions will be able to make use of the questionnaire, partly as material for supporting a better dialogue between the state and the region, but also where regions working in the area can find out about what is taking place in other regions.

The following questions were sent out to cultural heads at regional levels (regional associations/county councils/autonomous bodies) and contact persons for the county administration boards for RTP:

1. Has your organisation defined the area "Creative industries"? In which case – what areas are included?
2. Does your organisation have any special measures involving:
 - Programmes/plans
 - Mapping
 - Networks
 - Development work, projects
3. In what way are measures financed (internal and external funds, for instance from the EU)?
4. Do you co-operate with other players, and if so which?
5. Do you need assistance or measures from national authorities, and if so, in what way and which ones?

From the responses to the questionnaire, it can be seen that not all regions have defined the area and the responses show that the definition covers a range of different activities. An example of a model given prominence in the report is that of the Regional Development Council of Östsmåland and the KRUT project which is also used by six other counties. Östsmåland for some time has worked with the "creative sector". In connection with a study published in 2006 on the Norrköping pilot study, the sector was defined on the basis of 21 sub-sectors which in their turn were grouped into four main sectors: tourism/recreation/sport, media/digital, art/design and cultural heritage/information.

4. TOURISM SECTOR IN SWEDEN

The goal of the Swedish Government's tourism policy is for Sweden to be very attractive to tourists and to have a tourism industry that is competitive in the long term and contributes to sustainable growth and increased employment in all parts of the country¹⁸. Sweden is well on track to meet this goal. Tourism, and in particular the number of visitors from abroad, is growing and there is potential for continued growth and development. However, destinations and enterprises are facing many challenges as well. These include both issues that need to be resolved concerning cooperation and joint development processes as well as actual barriers for individual enterprises. We also need to improve and spread knowledge of global trends in order for Sweden to stand a chance of keeping up with a dynamic global market subject to tough competition.

The 2015 report of the Swedish Agency for Economic and Regional Growth underlines: "Probably the biggest challenge for tourism in the future is achieving sustainable development: economic, social and environmental. Global travel and environmental sustainability are going to require special attention in the light of climate change and local environmental loads in different parts of the world in combination with the rapid growth of global tourism. International travel and tourism are cross-border by nature. Consequently, solutions for sustainable travel must be largely sought within the framework of international partnerships and regulatory frameworks.

However, a global perspective does not discount the existence of national, regional, local, industry-related corporate responsibility for the development of sustainable solutions. Sweden wishes to follow the global trend, but equally to work towards contributing solutions ourselves. This is a matter of competitiveness, where demand by consumers for sustainable solutions is rising, and also a matter of responsibility. Examples of areas where more work can be done are research and technology development for greener transport, the implementation of sustainability systems with the relevant indicators at the destination level, 'basic' and innovative solutions for the enterprise level in areas such as energy, waste management and chemicals consumption, and various forms of certification systems for sustainable tourism applicable to destinations as well as enterprises.¹⁹"

The Agency uses the following three basic definitions for tourism: domestic tourism, inbound tourism and outbound tourism. "Country" in this definition may be replaced by region, municipality or any other administrative area. Domestic tourism comprises the activities of a resident visitor within the country of reference, either as part of a domestic tourism trip or part of an outbound tourism trip. Inbound tourism comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.

Sweden has adopted the United Nations internationally accepted definition of tourism. Since 2000, tourism's effects on the economy, exports and employment are measured in Sweden through Tourism Satellite Accounts, which aggregate the portions of consumption derived from tourism within various industries in the national accounts. Each TSA measures the value of the direct consumption of Swedish goods and services by both domestic and foreign travellers. The Tourism Satellite Account (TSA) method is an internationally accepted method developed by the World Tourism Organization (UNWTO), a United Nations body, in cooperation with the OECD and industry organizations.

¹⁸Tourism in Sweden – Facts and statistics

http://ec.europa.eu/regional_policy/sources/docgener/evaluation/library/sweden/1110_sweden_tourism_eval_en.pdf

¹⁹ Swedish Agency for Economic and Regional Growth <https://tillvaxtverket.se/english>

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

In Sweden, these accounts are prepared by the National Accounts division at Statistics Sweden (SCB) on assignment from the Swedish Agency for Economic and Regional Growth. In the same way as with other national accounts, the time series are revised each year, and consequently previous time series are not comparable with the most recently published data. Travel expenditure statistics in the balance of payments Statistics Sweden (SCB) produces quarterly statistics on travel expenditure growth, on assignment from the Riksbank, as part of the statistics on the balance of payments. The travel expenditure statistics show purchases and sales of currency. Purchases of Swedish currency generate an export value and purchases of foreign currency generate an import value. Swedens' expenditure when travelling abroad is therefore an import, and expenditure in Sweden by visitors from abroad is an export. Statistics Sweden (SCB) has recently revised the time series for travel expenditure.

4.1 Effects of tourism on the economy

Tourism consumption in Sweden continues to rise. Total tourism consumption in Sweden increased by SEK 18.5 billion or 7.0 per cent in 2015. Since 2000, total tourism consumption in Sweden has increased by a total of SEK 131.6 billion or 87.7 per cent in current prices, equivalent to an average annual increase of 4.4 per cent over the past 16 years. The export value of tourism, i.e. the value of consumption in Sweden by visitors from abroad, increased by SEK 17.1 billion or 17.9 per cent and amounted to SEK 112.6 billion in 2015. Since 2000, the export value of tourism has arisen by SEK 63.6 billion or 177.0 per cent at current prices. Since 2000, the export value proportion of total tourism consumption has increased from 27 to 40 per cent. Added value and the number of people employed in tourism have also increased since 2000. Since 2000, tourism's relation to/proportion of total GDP in Sweden has fluctuated between 2.6 and 2.8 per cent, which shows that tourism's share of GDP has remained at a fairly constant level in relation to the economy as whole.

The largest foreign markets were Norway with 3.5 million nights spent, followed by Germany (2.9 million) and Denmark (1.2 million). Nights spent by visitors from the fifteen largest foreign markets all increased apart from Russia. The markets that increased most in absolute numbers were Norway (+218,000 nights spent) Germany (+184,000 nights spent), followed by Denmark (+64,000 nights spent). In relative terms, Slovenia increased most (by 184.5 per cent) followed by Iceland (by 41 per cent) and Hungary (by 40 per cent)²⁰.

BFUF – the Swedish hospitality sector's own tool for research and innovation²¹

The aim of BFUF (the R&D Fund of the Swedish Tourism & Hospitality Industry) is to promote scientific research and innovation within the hospitality sector. Every year it advertises research funds for research projects that contribute to the development of the sector. It employs a long-term approach to engage the best and most highly qualified researchers to study the hospitality sector.

BFUF's scientific council, which has five members with Ph.Ds, assesses applications and supports BFUF's Board of Directors in its decisions regarding funding. It also initiates its own development projects.

BFUF was established jointly by Visita (Swedish hospitality industry) and the Hotel and Restaurant Workers' Union (HRF). Through these parties, companies working in the

²⁰ Ibid 17

²¹ BFUF (the R&D Fund of the Swedish Tourism & Hospitality Industry <http://bfuf.se/in-english/>)

5. CCI AND TOURISM SECTOR COOPERATION IN SWEDEN

Co-operation between culture and tourism has not always been self-evident in Sweden as in many other European countries. There have always been great differences between the cultural and tourist sectors, and the two have had different attitudes and values. In the cultural sector one speaks of underprivileged groups and experience while tourism speaks in terms of market adjustment, number of beds and guest nights. Tourism is concerned with profitability and pursues commercial and social targets. It has not (or rarely) regarded culture as a meaningful resource or source of earnings. Tourism always operates in relation to a public, whereas heritage conservation often has to give priority to measures of preservation and care and is unable to work on a sufficiently extrovert basis in relation to the public and visitors.

However, already in 1985 the Central Board of National Antiquities and the then Swedish Tourist Board inaugurated a joint scheme aimed at highlighting culture in the tourist context. The purpose of the project was to diversify the content of tourism in Sweden and to encourage partnership. The project operated intensively for seven years, after which it was expanded and came to include a number of other public institutions. During this time the following was implemented:

- 14 seminars up and down the country
- a databank of attractions and events
- an annual catalogue for cultural tourists.
- a book of ideas for the marketing of museums
- an inventory of suitable places for the development of tourism

The common aims of this large-scale venture were:

- to create understanding for each other's aims and attitudes
- to utilise each other's knowledge and resources
- to establish a network of contacts at local, regional and central level
- to bring culture to a new and wider audience.

There were expectations on both sides.

The tourist sector wanted to:

- identify new attractions and experiences
- reach a new and larger public
- create new job opportunities
- make money

The heritage conservation sector wanted:

- to acquire large resources for bringing the cultural heritage to life
- create understanding and respect for the cultural heritage
- increase the determination to preserve and care for Sweden's cultural heritage
- achieve better marketing of places of historic interest
- to achieve a wider spread of tourist flows liable to damage the cultural heritage.

The Swedish Agency for Economic and Regional Growth (Tillväxtverket) is the authority responsible for tourism and issues related to the visitor industry and implements initiatives for the promotion of tourism enterprises and entrepreneurship. The Agency is also responsible for producing and disseminating information about the development of tourism in Sweden, and is specifically responsible for the accommodation statistics that are part of Sweden's official statistics. In 2015, global travel continued to

Country Report – Sweden

trend positively. In Sweden, tourism's total volume of trade increased by 7.0 percent to SEK 18.5 billion. The export value of tourism, i.e. consumption by visitors from abroad in Sweden, increased by all of 17.9 per cent or SEK 17.1 billion in 2015, thus contributing to Sweden's economic growth. Global travel and tourism are expected to increase by approximately 3 per cent per annum up to 2030 according to international projections.

Sweden seems well placed to benefit from this increase, since its fundamental resources in the form of attractive destinations and facilities, as well as value-added forms of nature and culture are in line with what both leisure and business travellers are likely to demand. Many parties are reliant on decision material. Government agencies, sole proprietors, tourism organizations, tourism consultants, and research institutes often utilize the sources used in this publication for their analyses of specific questions. Tourism is not a separate industry but is defined on the basis of the tourist's/visitor's consumption in a wide range of industries. This makes describing and measuring tourism in a simple way quite difficult. In this publication, tourism and travel are illuminated from a number of different perspectives.

Tourism's share of the Swedish economy remained unchanged at 2.7 per cent in 2015, but continued to grow in relation to Sweden's total exports and employment. The main driver is a very strong influx of visitors from abroad. Tourism continued to grow even during 2015, with consequential increases in exports and employment. In 2015, the export value of tourism (foreign visitor consumption in Sweden) grew by 17.9 per cent or SEK 17.1 billion. By comparison, Sweden's total exports of goods and services increased by 7.7 per cent. In 2015, the export value of tourism as a share of Sweden's total exports rose to 6.0 per cent, a share which is up 3.9 percent since 2000. The effects of tourism on people in work in relation to total employment growth in Sweden also strengthened in 2015. The number of people employed as a result of tourism increased by 9,000 to 165,400. This corresponds to an increase of 5.8 percent, which may be compared to the total increase in employment for 2015 of 1.5 per cent.

Tourism in Sweden has been growing for many years. Since 1995, the number of nights spent at hotels, holiday villages and youth hostels has increased by 71 per cent. The number of nights spent by foreigners increased by just over 111 per cent during this period, and the domestic volumes rose by 61 per cent. This trend grew stronger in 2015, and nights spent by foreigners increased by all of 10.4 per cent. Such strong growth has not been recorded for over 20 years. In the past 5 years, growth has come primarily from non-European markets, which has risen by 14 per cent per annum on average.

6. SWEDEN'S BILATERAL AND MULTILATERAL CCS/CCI AND TOURISM COOPERATION

Council of Europe: The Cultural Routes programme was launched by the Council of Europe in 1987. Its objective was to demonstrate, by means of a journey through space and time, how the heritage of the different countries and cultures of Europe contributes to a shared cultural heritage. The Cultural Routes put into practice the fundamental principles of the Council of Europe: human rights, cultural democracy, cultural diversity and identity, dialogue, mutual exchange and enrichment across boundaries and centuries. In December 2010, the Committee of Ministers of the Council of Europe adopted Resolution CM/Res(2010)53 establishing an Enlarged Partial Agreement (EPA) to enable closer co-operation between states particularly interested in the development of Cultural Routes.

Certified Cultural Routes of the Council of Europe crossing Sweden²²:

- The Santiago De Compostela Pilgrim Routes
- The Hansa
- The Viking Routes
- The European Route of Jewish Heritage
- The European Route of Cistercian abbeys
- The European Cemeteries Route
- The Route of Saint Olav Ways
- The European Route of Megalithic Culture

Legal instruments (Universal standard-setting documents: 26 ratified and 14 non-ratified (*the four latest instruments listed below*)

- Convention on the Protection of the Underwater Cultural Heritage: non-ratified
- Convention for the Safeguarding of the Intangible Cultural Heritage: ratified (26 January 2011)
- Convention on the Protection and Promotion of the Diversity of Cultural Expressions: ratified (18 December 2006)
- International Convention against Doping in Sport: ratified (9 November 2005)

World Heritage Sites (UNESCO)²³: 15 (13 cultural, 1 natural and 1 mixed)

Cultural:

- Agricultural Landscape of Southern Öland (2000)
- Birka and Hovgården (1993)
- Church Town of Gammelstad, Luleå (1996, name change in 2014)
- Engelsberg Ironworks (1993)
- Hanseatic Town of Visby (1995)
- Mining Area of the Great Copper Mountain in Falun (2001)
- Naval Port of Karlskrona (1998)
- Rock Carvings in Tanum (1994)
- Royal Domain of Drottningholm (1991)
- Skogskyrkogården (1994)
- Struve Geodetic Arc (2005)
- Grimeton Radio Station, Varberg (2004, name change in 2014)

²² Council of Europe Cultural Routes <http://culture-routes.net/cultural-routes/list>

²³ <http://whc.unesco.org/en/list/>

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

Decorated Farmhouses of Hälsingland (2012)

Natural:

Kvarken Archipelago / High Coast (2000)

Mixed:

Laponian Area (1996)

Biosphere Reserves: 5

- Kristianstad Vattenrike (2005)
- Lake Vänern Archipelago (2010)
- Blekinge Archipelago (2011)
- Nedre Dalälven River Landscape (2011)
- East Vättern Scarp landscape (2012)

Tentative List: 1 property

- The Rise of Systematic Biology (2009)

Memory of the World Register: 6 inscriptions

- Astrid Lindgren Archives (2005)
- Emanuel Swedenborg Collection (2005)
- Ingmar Bergman Archives (2007)
- The Alfred Nobel Family Archives (2007)
- Codex Argenteus – the ‘Silver Bible’ (2011)
- Stockholm City Planning Committee Archives (2011)

Creative Cities Network: 1 • Östersund, UNESCO City of Gastronomy

7. CASE STUDIES

Case studies have been selected either as proposals by our interlocutors during country missions, and/or identified *in situ* by the experts or through deskwork and study of existing literature. It has been particularly difficult in certain cases to identify relevant case-studies focused on the theme of this assignment for reasons that is further developed in the cross-country report.

7.1 Sustainable destination development (Production and value-chain management)²⁴

This is a project initiated by the Swedish Agency for Economic and Regional Growth (Tillväxtverket), with the participation of public and private partners. The total budget was circa 6,4 million EUR, with 1 million for each destination and 1 million to common project development. Each destination had to co-finance circa 1 million EUR, also including private co-finance (e.g. from participating companies).

The Sustainable Destination Development initiative was a development project with the overall goal to strengthen and develop sustainable tourism destinations in Sweden over a four-year period (2012-2015). Bohuslän, Kiruna, Stockholm archipelago, Vimmerby and Åre were chosen to participate in the project. The objective was to improve their organizational structures and to engage the private sector in quality and sustainability improvements for sustainable destination development.

During 2012-2015 the destinations initiated a number of activities in order to prolong the tourist season, improve the quality of hosting tourists, develop new and more sustainable products and services as well as improve overall accessibility (considering the full accessibility chain from information of destination in various media, transport options, signaling at destination in multiple languages etc.). The overall goal was to improve the quality and competitiveness of the destinations with the objective to attract a higher number of international visitors while respecting the sustainability aspects in a holistic manner.

The project was guided by a national steering group consisting of the Swedish Agency for Economic and Regional Growth (Tillväxtverket) and VisitSweden. The project also included an integrated research and academia collaboration aspect, with the integral objective to learn and share best practices between the participating destinations and more broadly in Sweden. Hence, the project concept embraced an approach starting from an analysis of “WHAT” (including the status, capacities, challenges and resources). This analysis of the framework conditions and resources at the respective destinations eventually led to a better understanding of “HOW”, i.e. how to make sustainable destination development possible and a reality on the ground.

The project covered a wide spectrum of activities, which varied depending on the particular needs, evaluation phase and characteristics of the respective destination. However, several common features in the measures taken across the five destinations can be identified in the areas of:

- ⇒ Development of market demand knowledge and understanding of the international target groups
- ⇒ Innovation and product development
- ⇒ Business development, with a view on private tourists as well as B2B
- ⇒ Sustainability and quality development measures
- ⇒ Communication and trade market platform development and application
- ⇒ Knowledge and competence development measures

²⁴ <http://www.scpclearinghouse.org/scp-initiatives/959-sustainable-destination-development.html> - documents handed over during the country mission

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

- ⇒ Organisational development and building of partnerships
- ⇒ Enhancement of service culture and capacity, hosting knowledge and readiness
- ⇒ Development of accessibility aspects at destinations, including infrastructure development, signalling, guidance etc.
- ⇒ Areal / city planning and land use planning with a view to support holistic destination development.

7.2 Inside the black-box: Innovations in the hospitality sector

Initiated by a group of Jönköping International Business School post-graduates.²⁵

The project investigates what kind of innovations are available in the hospitality industry. It also explores whether there are differences in the power of innovation between the hospitality industry and other industries. It wants to shed light on the innovations in the hospitality industry and help to achieve a new perspective.

At the first stage, a review of the literature was carried out in order to define the concept of innovation, among other things. After that, a questionnaire survey of at least 500 people in the hotel and restaurant industry was conducted and statistics on innovations were developed. This concerned unique data that has never been produced in Sweden before. The survey included questions concerning whether the company has introduced a new product, a new service or has changed and developed its processes. With the aid of the responses, it was also studied whether there is a correlation between the ability to innovate and, for example, the size of the company, the level of education, the employees' background and the geographical location.

Proposed innovations: An app for ordering food, an improvement to a work process, how to display goods or produce and manufacture products.

Replicability: Knowledge of the links between innovative companies and where they are located geographically, who the workers are or which companies are located in the same place can be extremely important when, for example, a decision must be made concerning localization or expansion. Results and the knowledge are meant to help municipal politicians and national decision-makers to obtain better supporting data for making decisions on actions and in development strategies.

7.3 The whys or why nots of visiting a place: the significance of the information sent out that determines the success of an attraction²⁶

A project initiated by the Department of Service Management and Service Studies at Lund University.

The project studies what the significance of the actual information on a visitor destination has for attracting the tourist to that destination, and the purely practical way in which the tourist looks for different kinds of information. There is a certain amount of research on how we are influenced by information on the Internet before we travel as well as a number of studies on the more traditional sources of information such as brochures or guidebooks.

However, the industry is now facing a new situation now – there is now an explosion in the amount of information available, and above all one has the ability to access information whenever we like. This calls into question to some extent what people thought they knew. This initiative is something new linking

²⁵ <http://bfuf.se/research-projects/>

²⁶ Ibid 23

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

traditional and new sources of information while at the same time looking at what takes place both before and during the trip.

It studied what tourists do in purely practical terms when seeking information before and during their time in Sweden, and see which information sticks: why they choose to go to Sweden specifically, which information channels they use and how they combine the Internet and “offline” sources.

This study was conducted on German tourists, who form the next largest group of visitors to Sweden. Last year almost 3 million German guest nights were registered in Sweden. A mix of tried and tested methods were used such as interviews and questionnaires and a new one that is more experimental. With the help of the Visit Sweden overseas office in Hamburg questionnaires were sent out to visitors before their trip with a goal to obtain 500 responses. The third and more experimental method is to study 25 German households whose members are planning a trip to Sweden. They were given the task of organizing a trip to Ystad and Astrid Lindgren’s World which will involve spending two days in each place. By using forms of communication such as Skype they were monitored remotely and the way they seek information was recorded.

The idea was that this knowledge will help visitor destinations introduce a sharper edge to their strategic marketing and information in order to reach their target group.

7.4 To increase interest in Swedish sports events²⁷

A project run by the Centre for Tourism (CFT) at the University of Gothenburg and initiated by a group of highly involved international sports tourists: Harald Dolles, Professor, Centre for International Business Studies (CIBS) and affiliated with the Centre for Tourism (CFT), both University of Gothenburg and Erik Lundberg, PhD. in Business Administration, Centre for Tourism (CFT) at the University of Gothenburg.

The project is based on the principle that Sports tourism is becoming increasingly popular and an increasing number of international tourists travel long distances to participate in sports events. In Sweden many participants, local and from overseas are attracted to *Vasaloppet*, *Lidingöloppet*, marathons, triathlons and cycling events. However, the competition for international sports tourists is increasing. With more and more events to choose from – how can one guarantee that those international athletes choose to come to Sweden? Having a good reputation as a host country, is not good enough. The project wishes to gain a better understanding of the way highly involved and active sports tourists think and make their choices of participation. With that knowledge in mind, Sweden can develop strategies to raise the profile of high-profile Swedish sports events on the international market and also awareness about how to package their offers.

By collaborating with *GöteborgsVarvet* and the group of events marketed as “classic” sports events, data were gathered in the form of questionnaires from a large number of participants. The questionnaire included questions about travel habits, the decision making process, on the athletes’ information gathering, etc. The team also examined their “event portfolios” (whether they participate in several events) and their “event careers” (how their participation has changed over time) and compare this with general socio-demographic data, like age, gender, level of education and income. In interviews with the organizers they focused on the history of the event, the event’s (international) marketing strategy and how and why these have changed over time.

The project will help enhance the attractiveness and competitiveness of Swedish events in the increasing international competition and reinforce the image of Sweden as a destination for sports events.

²⁷ Ibid 23

7.5 When is food worth a journey? A study of culinary tourism²⁸

A project initiated by the School of Business and IT, University of Borås.

The project is based on the fact that there is currently considerable interest in gastronomy, food and meals – culinary tourism has grown strongly and become increasingly important namely for the Swedish hospitality sector in recent years. Despite these successes, Sweden is still lagging behind leading countries such as France, Italy and South Africa, and the level of profitability for parties such as fine food creators, farm shops and restaurants is low. The project is studying the growth of culinary tourism – the conditions that govern it, the challenges and opportunities that exist and whether there are any specific obstacles to growth. Also it investigates how the potential within food and gastronomic cooking can be utilized to create a positive experience of a place, and how this can strengthen an existing visitor destination.

The idea is that food and drink must be included in the actual planning of the journey and that this must be an important part of the experience. However, it is not exactly easy to investigate this. Food is a long way down the list when you ask tourists about their reasons for visiting a particular destination, although when you ask them after their journey what they remember best, it comes significantly higher up. Measurement problems have no doubt contributed to people working in the hospitality sector occasionally underestimating the role of food.

The project followed an ethnographic method, carrying out case studies and interviews, including at farm shops in Skåne and Sjuhäradsbygden and the surrounding area. It also studied the role of food in tourism at events, trade fairs and at travel destinations, such as the Eurovision Song Contest in Malmö and at Gekås in Ullared, which is consciously focusing on food. The entire entrepreneur chain, from producers and distributors to consumers was examined and in order to obtain a comprehensive picture, and also an attempt to study how development organizations (organizations for destination and food development) interact with politics, social structures and policy level.

The results will be used for development work within culinary tourism and for the marketing of the whole of Sweden, regions and specific locations as culinary destinations.

7.6 The Shellfish Journey²⁹

A global trend in destination marketing is to focus on local and traditional food. Tourism organizations have used food events and developed local food concepts around stories to promote their destinations. The Swedish case is about using local food and storytelling in destination marketing and development. More specifically it focuses on building a strong brand around sea food with the aim to strengthen the attractiveness of Bohuslän on the west coast of Sweden. The project started in Spring 2008 and the first shell fish event took place in Autumn 2009. For the 2010 event, in late October, the number of actors involved has increased, the event has been extended from a weekend to two weeks, and the area for the event has been extended geographically with more municipalities involved.

The research was a process of progressive problem solving guided by the researcher. For the evaluation of the first year event twelve interviews with stakeholders were carried out as well as a customer survey and participant observation during the event. The interviews were followed up by meetings with stakeholders to investigate the progress of the project.

²⁸ University of Borås <http://www.hb.se/en/Research/News-and-events/Magazine-1866/Articles/2016/food/>

²⁹ Possibilities and drawbacks of using storytelling as a means of developing and marketing Nordic tourism destinations, Norden, Dr. Lena Mossberg & research assistants Eva Forslund, Jenny Nilsson, Jenny Bui, My Wrethagen

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

In North Bohuslän, four shellfish academies have opened: the Prawn Academy in Strömstad, the Lobster Academy in Hunnebostrand, the Oyster Academy in Grebbestad and the Mussel Academy in Lysekil. In addition, academies for crayfish and crab are also being considered. The aim of these academies is safeguarding local traditions and promoting the high-quality products in various arenas. They wish to build up a knowledge bank and promote research, as well as support increased cooperation between interested parties, in order to benefit from the potential attractiveness of shellfish.

The project started in spring 2008. The academies, together with interested parties from tourism offices and some restaurants, decided to seek money for a preliminary study from Leader Ranrike (EU). The application was accepted and the goal of the preliminary study was to develop a concept that could be turned into an action plan for how the organizations could work together under one brand to guarantee a high-quality culinary product using locally sourced raw ingredients. One sub-goal was to increase interest in visiting the region during the low tourist season.

The established working group assumed that there are huge opportunities for creating new products and developing new seasons with help of shellfish. Contributing players believed that they are sitting on a unique resource that is currently not being fully exploited.

Valuable in this first phase was the creation of new networks and the insight of new ways to work together with shellfish as the common denominator. More funds were sought from Leader Ranrike (EU) to implement the project. A number of meetings and workshops took place. It became clear that the shellfish academies are strong organizations individually, but they need a common platform that illustrates and strengthens both the raw ingredients that they represent and the qualities and values associated with the original environment of the raw ingredients. None of the academies had paid staff – all were dependent on highly interested and involved volunteers. All participants agreed that Halloween was suitable for the event. The timing was good, bearing in mind that many people have a day free and the children are on school holiday as well as many activities associated with the beginning of the lobster season are over and the Christmas food season has not yet started.

The concept was developed during the workshops and all agreed that it should be based on storytelling around shell fish and shell fish dishes. All participating restaurants should have shell fish dishes on the menu during this weekend. It was decided that each dish must contain, three shell fish that should always be included. Other content could vary, but it was considered important that the academies had to be represented through shell fish meals. Each participating restaurant could have its individual table setting and they could choose which drinks to serve. However, in the restaurants there should be a description of the history of the academies, the shell fish, and the environment in which they are found. The description should be identical. The shell fish dish was considered as the basic product, but the restaurant could expand the menu with starters and serve other dishes after the shell fish dish.

Organizers of activities like lobster and oyster safaris, mussel barbeques, and guided tours at e.g. aquariums could all tell their stories but the stories should be linked to the shell fish academy at the destination. It was the same rule for all participating organizations, e.g. various kinds of accommodation facilities who could be a part of a package or offering a package by themselves.

To brand North Bohuslän with help of shellfish was perceived very positive. The stakeholders thought it was important to work with a long term branding strategy. They pointed out the fact that a brand cannot be built over night and that it has to be a recurring weekend, which the visitors can look forward to, talk about and build up expectations around. New networks have also been created across municipalities – from North to South Bohuslän. Representatives from hotels, restaurants, shell fish distributors, tourist attractions, tourism organizations, municipalities have gathered to discuss issues concerning the Shellfish Journey and destination branding. Hotels in the region had met for the first time to discuss marketing strategies.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

7.7 “In Arn’s footsteps”³⁰

The West Sweden Tourist Board markets tourism products and services in the West Sweden County. The county aims at be the leading culture region in Sweden. The assignment for the Board is to achieve the most visited, appreciated and profitable tourist region in Scandinavia. Västra Götaland County on the western coast of Sweden faces the waters of the strait of Skagerrak towards Denmark and Norway, and the lakes Vänern and Vättern inland. The Göta Canal unites the water ways to the Baltic Sea. The county comprises of three provinces including 49 municipalities. Dalsland-province borders Norway, and offers a scenic landscape with lakes and dense forests. The Bohuslän-province has a rocky coastline and picturesque Literature tourism linked to intangible cultural heritage fishing villages. The Västergötland-province bordering the lakes has many historical sites including beautiful castles and manor houses. The capital and gateway of the county is the harbour town Göteborg (Gothenburg).

A regional tourist strategy sets out the objectives of the activities. It is directed to establish a leading culture and prosperous business region, to gain prominence in knowhow development and competence, well-functioning infrastructure and communication, and input to the health and well-being of the citizens. The scope of the business development areas is multifaceted, dealing with outdoor, marine and historical – particularly medieval - tourism, uses of water ways like the Göta Canal and exploiting the region’s textile industry and conference services as well as design competence.

The mediation of living cultural heritage Knight Arn is a literary figure, created by the Swedish author Jan Guillou. Arn de Gothia was born in a high-ranking Swedish noble family in 1150, and educated in a monastery. As a young man, he was sent to the Holy Land as a knight templar to do penance for a forbidden love. In the last novel of Guillou’s trilogy on Arn he returns home. The story is inspired by the medieval histories that took place in the county and in the Holy Land. The author’s ambition has been to show the similarities and cultural interactions between the Islamic and the Christian worlds, both in medieval times and today.

The tourism concept “In Arn’s footsteps” aims at using Guillou’s literature for reaching a broad audience. The idea to travel around to sites which are mentioned in the books arose spontaneously of itself. People started to visit the places, whereby local authorities and private landowners had to get ready to respond to their interest. It forms a cultural tourism crusade in the county. The tourist activities are anchored into the sites and monuments in the vicinity. Some places are dedicated for action and excitement, and others for peace and reflection. New ways and improvements, such as visualizing, are used to mediate knowledge and interpretation. Within the concept, the tourist and the culture sectors collaborate in order to develop a long term culture tourism business that is based on medieval history in the region.

Networks and stakeholders include travel agencies, tourist boards, re-enactment groups, craftsmen and artists as well as guides. Local heritage networks comprise of inns, cafés and different types of accommodations. The media and authorities are involved, too. Products include travels, guided tours, lectures, events, souvenirs, music and theatre, food and drinks, church ceremonies, film and TV as well as literature. Total tourist turnover of the county in 2004 was 118 million Swedish crowns (SEK, around 12.5 million EUR). The “pure” turnover of the Arn-tourist, who travels to the county primarily because of Arn, made up nearly one third (35 million SEK, around 3.7 million EUR). Most of the income is generated by restaurants and hotels. In order to develop the approach further, society should treat cultural tourism as a

³⁰ More information: www.arnmagnusson.se - The text is based on the presentation “A Successful Tourism Concept of the Knight Arn” by Anja Praesto.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

tool for expansion. Different kinds of pay-back-investments from those who earn should be developed for implementation.

The increased market orientation and product development are challenges for the in culture sectors. Regional cooperation has led to international co-operation between neighbouring countries and even further, with Syria and Jordan. Research, also as a tourism experience, is included in the activities. New attractions are needed, as well as to secure the quality of the existing attractions, the education of stakeholders and the use of new technologies. Tourism products need ongoing updating. New products deal with, for example, pilgrimage, "Swedish Royal route" and the film Arn - the Knight Templar, which was seen by 1.2 million people in Scandinavia in spring 2008 and will be launched in the rest of Europe in 2009. The movie brings forward a new kind of tourism - film tourism.

8. COUNTRY CONCLUSIONS AND OBSERVATIONS

8.1 General conclusion

The views and data collected during this exercise highlight how the understanding of CCIs in the 11 NDPC countries is a continuous negotiation between three key dimensions:

- the definition of CCIs itself
- the way CCIs are seen in the economy in relation to public, private and not for profit sectors;
- the complex intersection of European, national but also regional and urban policy frameworks

Both the ToR of our assignment and the approved Inception Report underlined a challenge which is also an essential finding of the study “11 Dimensions - Trends and Challenges in Cultural and Creative Industry Policy Development within the Northern Dimension Area”, commissioned by the NDPC and published in May 2015 which states that:

"The ND countries comprise a very heterogeneous region in terms of CCIs. This heterogeneity stems largely from the fact that the countries are at different stages of development considering the CCIs. Depending on the stage of development, there are considerable differences in how the CCIs are viewed ranging from traditional arts and culture to focus on creative economy. Similarly, there are differences in which sub-sectors are included under the CCIs. Furthermore, the CCIs are only beginning to have a national policy status throughout the region, and the focus and real actions taken to develop the sector are varied".

This finding has been greatly confirmed by the field missions and the deskwork done during the study phase. The inter-related dynamic environment of policy making for the specific field concerned by our mission underlines the necessity for constant transnational exchange of information and knowledge in the field of cultural research. This aspect will be more concretely illustrated by the cross-country report and respective recommendations.

8.2 Country conclusions

1. Sweden has no single official definition of the creative industries. The most commonly used approach originates with The Knowledge Foundation (KK-stiftelsen) and includes "architecture, computer and TV games, design, film, photography, the arts, literature, the media, market communication, fashion, music, cuisine, scenic arts, tourism and experience based learning". Culture is a cross-cutting sector in a large number of central current programmes such as:
 - Attractiveness and a good living environment
 - Creativity
 - Entrepreneurship and running a business
 - Democracy
 - Diversity
 - Public health
2. At the regional level there is ongoing development work to promote regional growth in the best way. Here the "experience industry", creative/cultural industries and culture are important parts. The Minister for Culture and the Minister for Enterprise, Energy and Communications have hosted seminars and dialogues at which representatives of both culture and business met to talk about what is needed to develop the cultural and creative industries. This has resulted in an action plan for cultural and creative industries involving the investment of SEK 13 million.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

A Council for Cultural and Creative Industries has been appointed to support government ministries in their work on these issues. It appears that support for cultural and creative industries will become an increasingly important focus for cultural policy on the national and, especially, on the regional and local levels of government.

3. As in the other Nordic countries, Swedish authorities did not traditionally have a specific policy towards CCIs. However, schemes have for a long time existed to support quality production in the areas of books and art periodicals, music and film. These support systems play an important role in Swedish cultural policy.

Much more than on the national level, cultural and creative industries tends to be in focus on the local, and to some extent on the regional, level. Several Swedish cities and less populated municipalities have made efforts to use culture as a means to revive the local economy and make the municipality a more attractive place to live or invest. Such efforts are often guided by the notion of cultural planning, focusing on mapping and making use of all of the cultural resources available in the local cultural life. Especially noted for such efforts are, for example, Malmö City and the regional government of South Småland.

4. Today there are significant efforts deployed to analyze how "cultural industries" on their own or in interaction with other industries can contribute to sustainable growth.

There is a tradition in Sweden similar to that in other countries to attribute certain activities to the cultural area, one example being architecture. Some years ago the Ministry of Culture established the "National Council for Architecture, Form and Design" to develop policy in the area. In contrast to UNESCO's assessment, it considers that "architecture" is an activity that should be included in cultural industries.

Additionally, it has been decided that everything in IT be excluded from cultural industries except for specific industries with final products that are bearers of cultural product values. Virtually all reports on cultural industries are unanimous in viewing interactive games (computer games) as such products.

5. The Swedish Agency for Economic and Regional Growth (Tillväxtverket) is the authority responsible for tourism and issues related to the visitor industry and implements initiatives for the promotion of tourism enterprises and entrepreneurship. In this optic, the importance of CCIs has been growing highly during the last decade.

The Agency uses the following three basic definitions for tourism: domestic tourism, inbound tourism and outbound tourism. "Country" in this definition may be replaced by region, municipality or any other administrative area. Domestic tourism comprises the activities of a resident visitor within the country of reference, either as part of a domestic tourism trip or part of an outbound tourism trip. Inbound tourism comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.

6. Both in CCIs and Tourism, Sweden adopted definitions and indicators emanating from international standard-setting documents, such as those produced by UNESCO. This is a positive aspect of having national legal frameworks matching the international agenda.

7. Although co-operation between culture and tourism has not always been self-evident in Sweden, the two sectors being considered as having different attitudes and values, new dialogue initiatives have been launched in order to develop dialogue and cooperation between them, namely based on the principle of innovation. One prominent example is the series of projects initiated by the BFUF (the R&D Fund of the Swedish Tourism & Hospitality Industry) in order to promote scientific research and innovation within the hospitality sector. Every year it advertises research funds for research projects that contribute to the development of the sector. BFUF was established jointly by Visita (Swedish hospitality industry) and the Hotel and Restaurant Workers' Union (HRF).

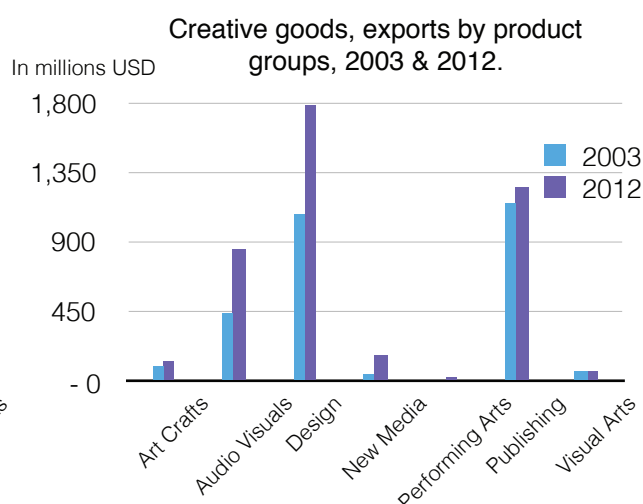
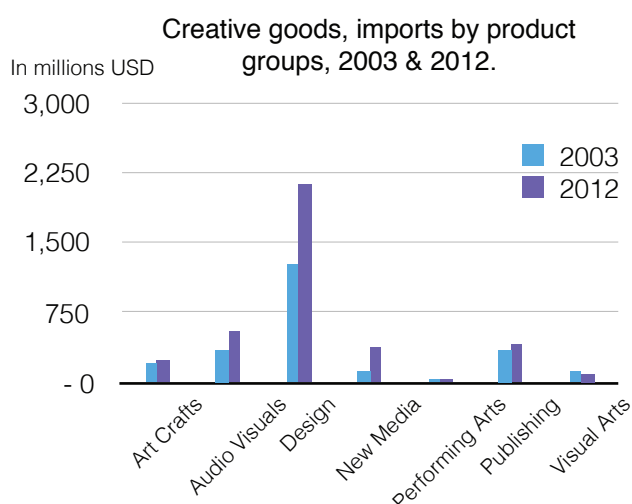
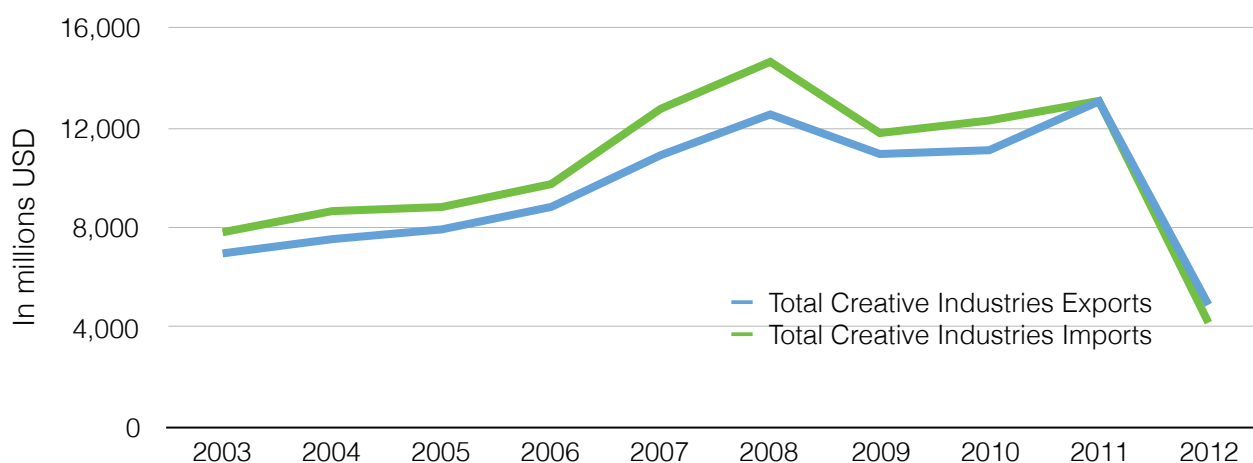
Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

Appendix A. Key Facts and Figures

COUNTRY PROFILE - Sweden						
Creative Industries Trade Performance, 2003 and 2012						
Sweden	2003			2012		
	Value (in Million US\$)			Value (in Million US\$)		
	Exports	Imports	Balance	Exports	Imports	Balance
All Creative Industries	6,960.01	7,806.57	846.56	4,901.57	4,184.91	716.65
All Creative Goods	2,924.05	2,419.18	504.86	4,317.19	3,828.79	488.40
All Creatives Services	4,035.96	5,387.38	1,351.42	584.38	356.12	228.25

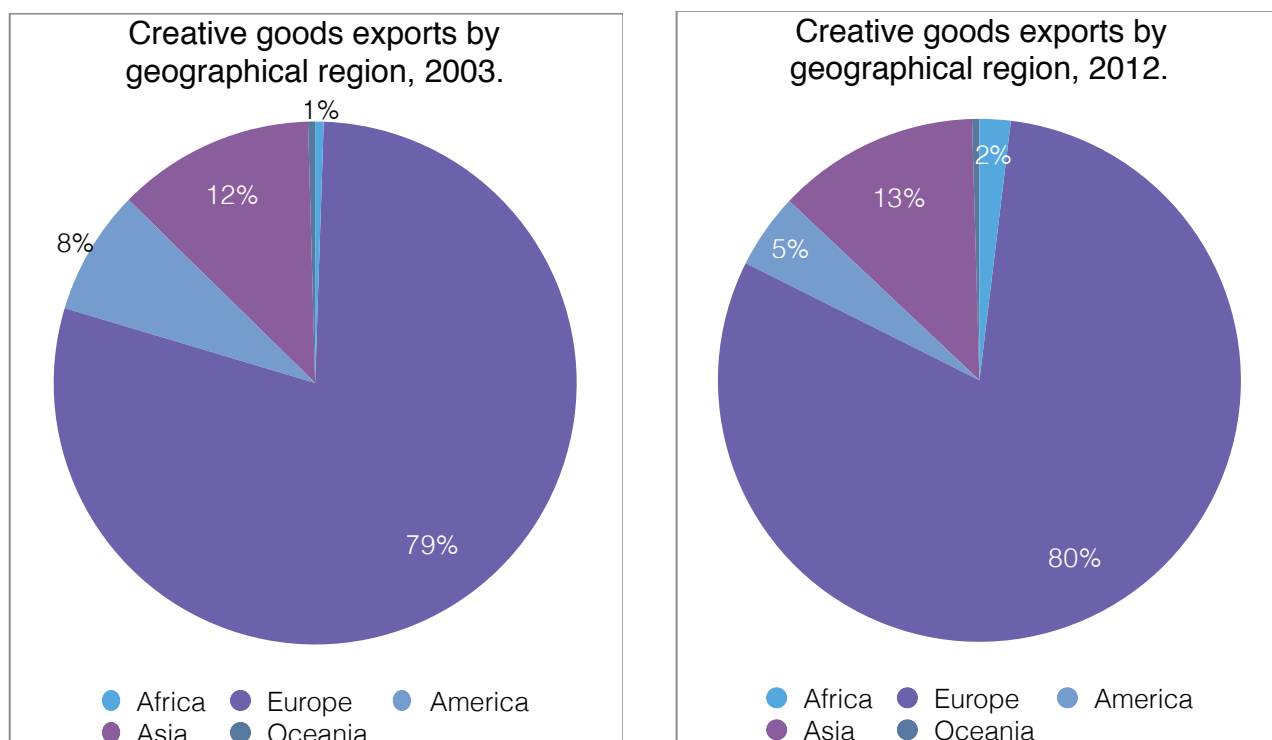
Sweden: Creative Industry Trade Performance, 2003-2012.



Creative goods exports stood at \$4,901.6 million in 2012 showing a decline compared to 2003 figures. However, it registered a trade surplus of \$716.6 million. Design and publishing were leading sectors in terms of international trade. Interior design, fashion and toys stood at \$1,790 million in 2012 followed by publishing (newspaper and books) which stood at \$1,263 million in 2012. Swedish design over the years has been a socially oriental style reflecting people's situation in life (Sweden Sverige). IKEA is a successful example. Swedish designers are increasingly focusing on sustainable development.

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden



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	Norway	544.39	160.73	383.67	Norway	1,095.81	173.92	921.88
2	Germany	313.36	229.56	83.80	Denmark	513.74	490.17	23.57
3	Denmark	302.43	321.03	18.60	Germany	418.75	462.82	44.07
4	United Kingdom	296.34	178.09	118.25	Finland	409.79	156.95	252.84
5	Finland	203.19	105.55	97.64	United Kingdom	245.97	222.76	23.21
6	United States	165.94	86.80	79.14	Saudi Arabia	166.21	0.11	166.10
7	Netherlands	116.71	125.90	9.19	United States	154.56	114.97	39.60
8	France	98.16	35.71	62.45	Netherlands	154.32	207.92	53.60
9	Spain	65.99	17.90	48.09	Poland	97.24	193.44	96.20
10	Italy	62.30	108.40	46.11	France	93.07	66.98	26.09

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

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

Appendix B. Key documents and sources

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Sources:

The Swedish Agency for Cultural Analysis (Myndigheten för kulturanalys)

<http://www.kulturanalys.se>

The Swedish Association of Local Authorities and Regions (Sverigeskommunerochlandsting)

<http://www.sk.se/>

Professional associations Artistic and Literary Professionals' Union / KLYS

<http://www.klys.se/>

Grantgiving bodies The Art Grants Committee / Konstnärnämnden

<http://www.konstnarsnamnden.se>

The National Council for Adult Education / Folkbildningsrådet

<http://www.folkbildning.se>

The National Handicraft Council / Hemslöjdsnämnden

<http://nfh.nutek.se/>

The National Public Arts Council / Konstrådet

<http://www.statenskonstrad.se/>

The Press Subsidies Commission / SvenskaPresstödsnämnden

<http://www.prestodsnamnden.se>

The Swedish Authors Fund / SvenskaFörfattarfonden

<http://www.svff.se/fondeng.htm>

The Swedish Film Institute / Filminstitutet

<http://www.sfi.se>

The Swedish Institute / Svenskainstitutet

<http://www.si.se>

The Swedish Visual Artists Fund / Bildkonstnärnfonden / Konstnärnämnden

<http://www.konstnarsnamnden.se>

Cultural research and statistics: ABM. Department for Archive, Library, Information and Museum Sciences, Uppsala University

<http://www.abm.uu.se>

ACSIS. Advanced Cultural Studies Institute of Sweden

Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?

Country Report – Sweden

<http://www.isak.liu.se/acsis>

Bank of Sweden Tercentenary Foundation

<http://www.rj.se>

CCE. Centre for Cultural Economy, University College of Kalmar

<http://hik.se>

Centre for Cultural Policy Research, University College of Borås

<http://www.hb.se>

Department of Conservation, Gothenburg University

<http://www.conservation.gu.se>

Department of Culture and Media, Umeå University

<http://www.kultmed.umu.se>

Department for Culture Studies, Linköping University

<http://www.isak.liu.se/temaq>

Division of the Sociology of Literature, Department of Literature, Uppsala University

<http://www.littvet.uu.se>

ETOUR. European Tourism Research Institute, Mid Sweden University

<http://www.miun.se>

NodicomSweden. Nordic Information Centre for Media and Communication Research, Gothenburg University <http://www.nordicom.gu.se>

School of Arts and Communication K3, University College of Malmö <http://www.mah.se>

Statistics Sweden / Statistiska centralbyrån <http://www.scb.se>



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