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

CROSS-COUNTRY REPORT

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LIST OF ABBREVIATIONS

Acronym/abbreviation	Meaning
BR	Branch institutes
BSEC	Baltic Cooperation; Barents Regional Cooperation
CBSS	Council of the Baltic Sea State
CCE	Culture - Central Europe
CCI	Cultural and Creative Industries
CCS	Cultural and Creative Sectors
CEI	Central European Initiative
CF	Countries in focus
CIS	Commonwealth of Independent States
ECOC	European Capitals of Culture
EDEN	European Destinations of Excellence
EU	European Union
FWC	Framework Contract
GDP	Gross Domestic Product
IASPIS	International Artists Studio Programme
ICC	International Cultural Co-operation
MFA	Ministry of Foreign Affairs
MIC	Music Information Centre Norway
ND	Northern Dimension
NDPC	Northern Dimension Partnership on Culture
NFI	Norwegian Film Institute
NGO	Non-Governmental Organisation
NORLA	Norwegian Literature Abroad
OCA	Office for Contemporary Art Norway
OTAs	Online Travel Agencies
QR	Quick Response
SIDA	Swedish Internat. Development Authority
SME	Small and Medium sized Enterprises
SR	Shared Responsibility
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	World Tourism Organization
USA	United States of America
VR	Virtual Reality

PART 1. CROSS-COUNTRY REPORT

1. INTRODUCTION

This is a twelfth regional report which should be read in conjunction with the country reports which cover the eleven Northern Dimension countries: Denmark, Estonia, Finland, Germany, Iceland, Latvia, Lithuania, Norway, Poland, the Russian Federation and Sweden. In the country reports an attempt was made to give an overview of the country concerned in terms of the development of its Cultural and Creative Sectors/Cultural and Creative Industries and its tourism sector, an indication of the degree of interaction between the CCS/CCI and tourism sectors and a very general assessment of the degree to which the country engages with other Northern Dimension countries in those sectors. This is supplemented by country case studies.

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

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

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.

2. KEY QUESTIONS

It was explained in the introduction to the country reports that quite soon after starting our work, and indeed throughout the whole period, various interesting, sometimes challenging, questions arose, such as:

- Is there any reason why tourism itself is not considered one of the creative industries?
- In all three cases, the definitions of CCIs, tourism and innovation are various, unstable and contested. Is this because the necessary action to define them precisely and consistently at a European level has not been taken or is it because we are in a 'post-definitional' era with certain areas of human social and economic activity having become too diverse and complex to categorise easily?
- Tourism is a high priority for most Northern Dimension countries yet there were protests against tourism recently in Barcelona, arguably the most successful European city in terms of its tourism development and city brand. What does this signal about sustainability and local community engagement with/in tourism?
- When they do talk, do the tourism industry and the cultural and creative sectors speak the same language?
- Is the tourism industry's use of culture and heritage because of real engagement with the cultural and creative sectors or in spite of it? Even when they are moving in the same direction are they in reality on parallel but essentially separate tracks?
- Should tourism businesses be engaging with CCIs or vice versa, in which direction is the demand and in which direction the supply?
- Given that both sectors are to a large extent highly fragmented with a numerical predominance of SMEs, to what extent do the actors involved have the time and capacity to engage with each other innovatively or otherwise?
- 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 country reports we also drew attention to the fact that in the last couple of years there has been increasing interest in looking at the existing and potential linkage of the cultural and creative industries to tourism development. It however throws up considerable practical and methodological challenges and problems for various reasons and explains why relatively little progress seems to have been made. The major first hurdle is that the definition of cultural and creative industries is constantly evolving and, moreover, it differs from country to country[2]. This has been particularly evident in the case of the eleven Northern Dimension countries, even in the case of those countries which work very closely together, for example in the case of Lithuania, Latvia and Estonia. There can also be conceptually quite different national approaches. For example in one country cultural and creative industries may be seen as a distinct sector and be supported on that basis. In another country they may not even be seen as a sector but as part of something wider or cross-cutting such as one part of the creative economy, or as a part of national innovation, entrepreneurship or SME policies. The third issue flows from the other two. Because of an evolving and differing understanding in country terms of what the CCIs constitute, there is no common statistical base which allows clear

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

comparisons or benchmarking, something which is urgently needed and is beginning to start being explored at European level.

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

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

3. CCIS AND TOURISM LINKAGE CHALLENGES

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

The complications of identifying at a general level the existing and potential linkage of CCIs to the tourism sector is exacerbated by certain tourism sub-sectors being in their own right part of the cultural sector itself, for example in the case of heritage tourism. Both the CCIs and the tourism sector are not in reality clearly demarcated - both are imprecise, fluidly-defined, fast-changing and dynamic areas of complex and important economic and social activity. In the case of CCIs there are other complications. For example the arts 'lobbying industry' has for many years ubiquitously used the terms cultural industries and creative industries interchangeably in order to protect or bolster publicly-funded culture budgets. Although things have moved on and in many countries the importance of the arts, for example, is recognised and understood as a part of the creative industries value chain, there is still often a lot of blurring and definitional confusion[6].

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

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

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[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'.

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

[7] Online travel agencies

- Architecture - 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 gastro tourism 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?

4. "MARKET FAILURE" OR UNDER-UTILISED POTENTIAL RESOURCES?

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?

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.

5. CONCLUSIONS AND RECOMMENDATIONS

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'.

The first main conclusion we would draw is that while there may be a lot of interest in harnessing the CCS/CCI sectors and the tourism industry together, both are so very broad in their reach, fragmented, chaotic, fast-changing and multifarious that it is simply unrealistic, and indeed impossible, to align them in a general and 'broad brush' way. Therefore the question of how the CCS/CCIs could foster innovation in tourism in the Northern Dimension area can only begin to be tackled if the CCS/CCI and tourism sectors are both broken down into smaller, more manageable 'bite-sized' areas.

In short, 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 CCS/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 in the region.

Our next recommendation therefore is that in breaking down the very general notion of how the CCIs could foster innovation in the tourism sector into 'bite-sized' chunks, as a first step it would seem that heritage tourism, creative tourism (which we define below) and events tourism are likely to be the three most productive areas in which models and methods for cooperation can most easily be developed.

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 us 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'[8] or 'Gettyisation'[9]. 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.[10]

In terms of a continuation of the theme of breaking things down into 'bite-sized' chunks in addressing the question of how the CCS/CCIs and the tourism sectors can be encouraged to interact innovatively, the question is which areas of the CCS/CCIs lend themselves most obviously or most easily to cooperation. Our work suggests there are CCI areas which may have more immediate potential than others but there will be country differences for reasons of development, funding or policy priority.

It is clear that, as has been mentioned above, there is sometimes a conceptual problem for both traditional policy-makers and the general public to comprehend the nature of the cultural and creative industries and why they are important. In the case of the different CCI sub-sectors some are perhaps easier to understand than others. Design is one example. It is not difficult in the highly commercialised and competitive world in which we live to show that good design can make any kind of product more appealing or more distinctive and therefore more sellable. Design also is more understandable to traditional policy-makers and the general public because it can be seen to be linked to something tangible, for example the crafts tradition of a country, as is the case in the Baltic countries. It is of course also a tangible part of our everyday life. It is therefore not surprising that design is already being given very high priority in most Northern Dimension countries. On the other hand gamification or augmented reality or digital media are for many people more difficult to grasp and therefore the approach in terms of how they are promoted and how they are encouraged to foster innovation in tourism is going to differ considerably. Put simplistically a small tour company will understand that a good graphic designer may be useful for their publicity materials but the same company may well not see any connection between its business and gamification or augmented reality.

Our third recommendation therefore is that each CCS/CCI sub-sector needs to be seen and treated in its own context when looking to create synergistic links between it and the tourism sector. One size will not fit all.

Traditional CCS/CCI areas to target

The CCS/CCI areas that seem to us to be the ones that would be the most obvious or easiest to target include the following:

8 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.
9 A phenomenon sometimes referred to as 'Macdonaldsisation'
10 OECD (2014), Tourism and the Creative Economy, OECD Publishing, Paris.
DOI: http://dx.doi.org/10.1787/9789264207875-en

- design for reasons mentioned above - easily understandable, easily and directly relevant to innovative tourism product development apps development - the world, especially for 'millennials' and younger people, is already one of apps, yet it was sometimes surprising for us the degree to which they often did not exist in tourism-related CCS/CCI areas such as museums, heritage sites and so on.[11]Of course there are some good examples of where they are used but their value as a promotional tool in advance of a visit and for spreading information about what a destination attraction has to offer often seems not to be recognised or given the priority it deserves especially in the sometimes conservative world of heritage and museums
- festivals - we mention in the country reports as well as elsewhere in this report the problem of an absence of a common language which could link the CCI/CCS and tourism sectors and the need for 'bridges' between the two sectors. One area where there is sometimes some degree of communication and at least partial common understanding is in relation to festivals. Some of the very established festivals in the Northern Dimension countries have of course already been attracting inbound visitors for many years and in many cases they do not see a difference between 'tourists' and 'audience'. There are probably at least three general points which should be made about festivals. The first is that it does not seem to be a saturated market anywhere. The second is that there seems to be genuine and increasing interest in small, local and community festivals which is particularly useful in the context of development of rural tourism or urban neighbourhood tourism. The third point is that because they tend to have long lead times in terms of planning and programming etc and sometimes fixed dates they can be promoted by national and other tourism agencies which often plan their promotional activities 12-18 months in advance which is usually not a time scale to which most, especially small, cultural and arts organisations can work.
- routes and trails - we have in mind everything from very long cultural routes of the type traditionally encouraged by the Council of Europe through to a city walking tour or a nature trail in the countryside. All the evidence seems to be that although they make time to develop and mature the big cultural routes sometimes involving several countries are effective in developing new tourism products and services and in general seem to be appreciated. The special challenges of cooperation which sometimes exist between the Russian Federation and other Northern Dimension countries are perhaps less complex and more rewarding in the area of cultural routes. Certainly, there was positive feedback in this context in relation to the Via Hanseatica project.[12] Development of both the major cultural routes and small local walks and trails offers numerous opportunities to the CCS/CCIs to be inventive ranging from apps development, historical re-enactment, information that can be accessed through QR codes[13] and so on
- heritage sites - the greatly changed way in which heritage is now presented both because of new approaches to interpretation and technology developments is already opening up new opportunities for CCIs but as mentioned earlier is probably not happening as widely or as fast as it should even when the sites are of major importance such UNESCO World Heritage sites
- European Capitals of Culture (ECOC) and high-profile national celebrations - several cities in the Northern Dimension region have linked their 'ECOC year' with tourism, especially inbound tourism. Like festivals, it is an area where communication between the CCS/CCI and tourism sectors seems to

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11 We have in mind here destination guides/travel apps for all tourist destinations big and small so that everything one would expect to find on a major tourist destination's website is on the app. This would include history, sights, attractions, accommodation, places to eat, drink, relax and shop, calendar of events, QR codes etc).
12 Via Hanseatic is a tourism route which links interesting cities such as Luebeck, Rostock, Gdansk, Kaliningrad, Siauliai, Riga, Valga, Tartu, Narva, Ivangorod and St Petersburg.
13 The various 'Talking Statues' projects (e.g. in Copenhagen and Helsinki) are city walks where at each statue through a QR code, the person commemorated by the statue talks about himself or even in some cases telephones the tourist.

be easier to facilitate than in others, possibly because of the bigger budgets and priority given to it by the city concerned. In addition to the ECOC tradition which is now firmly established, there are occasionally other major events, the 2018 centenary events in the three Baltic countries are a particularly good example, where there is fertile ground for the CCS/CCI and tourism sectors to work together with the CCS/CCI perhaps able to provide the innovation and imagination that such national events often lack

- UNESCO's Creative Cities Network - it is evident that becoming a UNESCO creative city usually means that a local process has been carried out bringing together various parties and that one motivation for applying for such a status is connected with city destination branding. It is therefore fertile territory for CCS/CCI innovative involvement and cooperation with the tourism sector.
- museums - new approaches to what the function of a museum is, the idea that museum collections can and should be interpreted in different ways and greater access to collections which is being particularly facilitated by digitalisation are all leading to the re-positioning of museums in relation to actual and potential audiences, including in terms of both inbound visitors and domestic tourism. In the Latvia country report in particular we draw attention to this and how the museums especially the new and refurbished ones are beginning to see themselves and present themselves as an important tourism resource. There is a specific project of the Finnish Museums Association 'Focus on Museums into Cultural Tourism' carried out in cooperation with the umbrella tourism programme 'Culture Finland' and which was started in 2013.

Non-traditional CCS/CCI sectors

We mentioned earlier, perhaps apart from apps development, CCS/CCI 'traditional' and familiar areas. There are other 'non-traditional' areas however which perhaps could offer even greater potential for CCS/CCI and tourism sector joint collaboration. These include:

- digital games and gamification - these are two quite distinct areas. There are a few standard definitions of gamification, one of which is 'the use of game mechanics and experience design to digitally engage and motivate people to achieve their goals'. This definition captures the wide scope of gamification which is not simply about using games but using gaming techniques and experiences. The application of gamification and location-based augmented reality games could transform the tourism industry through increasing visitor numbers to cities, museums, theme parks and other points of interest. It can be used to boost sales, encourage repeat business, spread the word about destinations and places of interest and of course also provide fun, entertainment and interactive learning, digitally engaging visitors via their smartphones, tablets or other digital devices. Where gamification is being used successfully it is usually using a combination of experience design and gamification to produce high-value interaction. Examples of how gamification is currently being used include destinations producing a virtual map to guide visitors, highlight special facts about specific sights and entertain them with a challenge or quiz. Another example is creating new types of interaction or experience in a museum or other setting, for example through a gamified virtual tour or a digital 'treasure trail' for children which is more interesting than simply walking from one showcase to the next. Several countries in the Northern Dimension area have strong or promising gaming industries[14] and is an area in which the region could become a world leader given the right conditions. In 2015, the World Tourism Organization (UNWTO) organised an international seminar on 'Mobile Technologies for Improving the Tourism Experience' which contributed to greater

[14] Games, for example, are Sweden's biggest cultural export.

understanding and appreciation of the potential of gasification and things like mobile location-based augmented reality apps and games.

In order to stimulate a process and develop methods and models of encouraging the CCS/CCI and tourism sectors to work together innovatively, practical action needs to be taken in a narrowly-focussed way or, as described earlier, in 'bite-sized chunks'. To this end we would recommend that any practical action taken should in the early stages be limited in scope in terms of which CCIs or 'areas' should be targeted. It would seem to us those areas with the most potential or where productive engagement might be easiest, include: design, general apps development, development of and engagement with new and existing festivals (including small local or community ones), development of existing and new routes and trails, innovative approaches to visitor experiences at heritage sites, UNESCO Creative Cities Network, use of European Capital of Culture opportunities and similar significant national anniversary events, museums, digital games and gamification.

Specifically in relation to gamification and areas within in it such as development of certain types of mobile location-based tourism products and services, we would recommend that the NDPC looks at the possibility of encouraging the holding of seminars and workshops, similar to the UNWTO one mentioned above on 'Mobile Technologies for Improving the Tourism Experience', in order to increase understanding of this area's potential and to use such events to begin to create a shared agenda between the existing and fledgling games industries in the region and the tourism sector.

In the list of suggested prioritised areas we did not include creative tourism simply because it is a wide and generalised area but it should be a priority targeted area. Again we believe that developing a serious synergistic CCS/CCI and tourism relationship can only be achieved by beginning with focused and selective actions rather than a generalised approach. In the case of creative tourism we suggest that one prioritised area should be promotion of a wider practical understanding of what co-creation means in a tourism context and the implications and opportunities this has for CCS/CCIs. If, as all the trends show, there is a move away from 'mass sightseeing tourism' to 'individual experience-based tourism' many small CCS/CCI actors should be well-positioned to respond to this new market and move inside the tourism sector either partially or wholly.

6. THE COMMUNITY DIMENSION

Another dimension of creative tourism where there is an obvious role for the CCS/CCI sector is the community dimension and development of community and neighbourhood events and experiences including celebrations and festivals. In some of the towns and cities in the Northern Dimension region this is already happening where there are 'clustered' creative quarters. In such cases they are already increasingly seen by the tourism authorities as a significant new tourism resource. The future of creative tourism looks as though it is going to be based on a co-creative relationship between visitors, 'locals' and a particular attribute of a location. This will not mean that people will cease visiting museums or theme parks, but that there will be increasing tourism choice in where and how to spend time and therefore greater competition. Creative tourism will probably grow and co-exist alongside other forms of tourism. It should be noted that it is already getting on to the agenda of some of the national tourism agencies and the core of Finland's tourism strategy which is 'the Finnish way of life' is very much within the ambit of creative tourism development.

We believe the whole area of creative tourism to be particularly important in the Northern Dimension region partly because individual experience-based tourism is a growing world trend but in particular because in many of the ND countries there is already an awareness of the importance of presenting their distinctiveness in a highly competitive global market. The concept of creative tourism, and its implications, are both still at a relatively early stage and therefore there is an awareness and information gap that needs to be addressed. We recommend that the NDPC should consider whether creative tourism, and promotion of understanding of it and its potential, might become a major strand of its activity over the next couple of years. It could also offer a practical platform on which to bring CCS/CCI and Tourism sector actors together.

Above we began by looking at the general approach which should be taken to stimulate the CCS/CCIs to foster innovation in tourism in the Northern Dimension area. We made three points which should be emphasised in relation to that. The first is that while mention is sometimes made at a political level of linking the CCS/CCI and tourism sectors (and there certainly seems to have been growing interest in it over the past two years in particular), the reality seems to be that little or nothing of a practical nature is being done proactively or as a result of policy. We have suggested that there may be a variety of reasons for this including the conceptual and practical complexity of both sectors. The second important point is that in order to create engagement and foster tourism innovation any approach really needs to focus in the first instance in a practical way on what we have described as 'bite-sized chunks'. We have suggested what we believe could be sensible priorities in this respect. The third point is that how CCS/CCIs are defined, perceived and positioned in each of the Northern Dimension countries differs significantly. Apart from the very practical problems that this throws up of, for example, absence of standardised statistical information and of having to 'compare apples with pears', it also means that while a regional approach to fostering tourism innovation may be possible, at individual country level there will need to be fine-tuning, if not important adaptations, to local conditions and policies.

Having covered the general approach of how the CCS/CCIs could begin to be encouraged to engage more actively and effectively with the tourism sector in relation to fostering innovative tourism products, services, events and experiences, the question is how that general approach can be implemented and what the detailed actions within it might be?

As a starting point one needs to take into account at least three important factors. The first, and mentioned elsewhere in these reports, is that both the CCS/CCI and tourism sectors are highly fragmented and chaotic and that although of course there are 'big players' within them, numerically both sectors are often dominated by SMEs and sole traders. The second factor is that both sectors in different ways are quite difficult to understand for outsiders. The fact that many traditional politicians and policy makers, as well as large sections of the general public, are conceptually challenged in understanding the role and importance of the CSS/CCIs, means almost certainly that this is true too of many of those who work in the tourism sector. Similarly it will be true that many of those who work in the CCS/CCIs understand very little of how the tourism industry really works. This lack of understanding will be further exacerbated by the fact that the tourism sector is highly business-oriented and commercial while some parts of the CCS/CCIs do not operate on the basis of commercial principles and practices at all which means there is an additional gulf between them. Even where CCS/CCIs are businesses, in many cases their interest is in developing their chosen activity rather than building a business per se.

The third factor one needs to take into account, and which flows from the other two is the communication issue. Our work suggests that while, as we pointed out at the beginning of this report, there are a large number of examples of where the travel and tourism industry has used and does use CCS/CCI resources and expertise, in the large area where things are not happening it would seem to be a result of absence of communication. This absence of communication can almost certainly be explained by first, absence of a 'common language' and understanding of each other's sector and secondly by 'time-poverty' (always a problem for small businesses and sole traders) and the fragmented nature of the CCS/CCI sector where professional sub-sector/industry representation, which could develop the channels of communication, is sometimes weak or absent.

We also pointed out earlier that the situation is not that there is classic market-failure simply because there is evidence of engagement by the CCS/CCI sector with the tourism industry, but a problem of unfulfilled potential and under-utilised resources. With regard to unfulfilled potential and under-utilised CCS/CCI resources we do not believe this is an issue that the two sectors will resolve unless there is practical intervention at a policy, organisational and incentivisation level.

Accepting that the creative industries already contribute to the travel and tourism industry but that there could be a more developed relationship especially if initially targeted at a few very specific tourism sub-sectors, what kind of intervention is needed?

One question that arose from time to time during the course of our work was when there is engagement of the CCS/CCIs in the tourism sector or more specifically the fostering of innovation, to what extent is it because of, or in spite of, policy. An observation linked to that question was that when looking at the three separate policy areas of CCS/CCIs, tourism and innovation in the countries it was extremely rare to find any serious example, apart from declaratory references, to how the CCS/CCIs and tourism sectors should symbiotically engage with each other. In short while there are mentions nothing explicit or practical, with rare exceptions, such as in Finnish tourism policy and its Culture Finland umbrella tourism programme.

It is our belief that this is where there is a problem. It is fairly obvious that there should be very active interaction by CCS/CCIs in the tourism sector but because of the complicated nature of both sectors which has already been described in some detail it is not happening as it should and is not coming naturally from the sectors themselves. Detailed policy intervention is needed to signal specifically that the working together of these two sectors is a priority, rather than simply declaratory, very general references to the fact that it would be good if the CCS/CCI sector could contribute to other sectors such health, education, tourism etc which in reality, because of the special circumstances, do not push the agenda forward in any practical way. There is a need to employ the Hawthorne Effect, specific and clear attention needs to be given at policy level to the two sectors if there synergistic potential is seen as a real priority for development.

Our recommendation therefore is that if in the Northern Dimension region harnessing the potential of the CCS/CCI sector to the tourism industry is seen as important or a priority it is unlikely that much practical progress will be achieved without very specific and practical recognition of that in relevant policies which ideally should include those related to tourism, innovation and to CCS/CCIs.

If the CCS/CCIs and the tourism sector are explicitly linked at policy level it will immediately raise awareness and set in train some new developments especially if it can be put in the context of practical incentivisation measures which we will cover below. Explicit mention in policies will also make it easier to get the subject of new synergies between the two sectors put on the agendas of both of them. There are always good exceptions but during our work we gained an impression that detailed CCS/CCI-tourism cooperation was infrequently on the agendas of industry events, conferences and professional gatherings in either sector. We believe this is an essential prerequisite for a productive, expanded and structured relationship to be developed.

We recommend that within each of the respective sectors, tourism and CCS/CCIs, leaders and activists at all levels try to encourage as much as possible relevant issues and developments related to the other sector are put on the agendas of working groups, at professional gatherings and conferences and at industry events.[15] Along with this, there should be more effort made to organise joint events and presentations related to areas where there could be obvious mutual benefit for both sectors. During the course of our work we found cases of where, for example, there was a specialist national advisory group for cultural tourism but without anyone from the CCS/CCI sector on it, not even as an observer. Similarly there were cases of CCS/CCI events with a tourism dimension where no travel and tourism representatives were invited, again not even as observers. There is a general need for the creation of 'platforms' both formal and informal, ad hoc and strategically institutionalised where the CCS/CCI and tourism sectors can come together, learn about each other and develop business-focussed relationships which lead to innovative new tourism products, services, experiences and events.

7. INTEGRATE CULTURAL RESOURCES INTO TERRITORIAL SUSTAINABLE DEVELOPMENT

Cultural tourism development in the Northern Dimension countries should nowadays be dealt within the context of the integration of cultural resources and territorial sustainable development as an essential hinge in the compatibility between heritage safeguard and local development. Compatibility is a multifaceted concept with technical, social, economic and cultural dimensions: all these dimensions are to be dealt with by analyzing the territorial impacts (tangible and intangible impacts) of the different activities linked to heritage use, for housing, for tourist development, for upgrades to meet modern standards and to generate profitable economic activities for local development.

Cultural tourism can of course also be a powerful shaping and driving force for other sectors of the economy, including the creative industries, arts, fashion-related sectors, transport, gastronomy and food products, trade and other types of services. Moreover, the integration of natural and cultural resources in the Northern Dimension countries' territorial development presupposes the existence of a co-ordination network (such as transport, parking areas, visitors' centres etc) to improve their accessibility and use. Such integration in a territorial development network necessitates the enhancement and adaptation of these resources to modern standards (for the safeguard of heritage values, but also for their adaptation to evolving tourism needs and for the comfort and safety of both residents and visitors), while the environmental impact of course needs to be carefully considered.

Concerning economic compatibility, it is important that enhancement interventions should develop all cultural resources by capitalising on the complementarity of the different categories of heritage. Any intervention of enhancement (for example rehabilitating urban districts, creating or upgrading infrastructures and so on) should also sustain local market development and 'valorise' its human resources and know-how in order to assure the sustainability and viability of the intended economic enhancement process.

At the social and cultural level, any enhancement intervention to enhance and co-ordination network related to heritage and for income-generating purposes should ensure social cohesion and the safeguard of the local populations' identity so that all categories of both residents and visitors can benefit from that heritage and identify with it. Far from being merely a source of revenue, cultural tourism is first and foremost a source of spiritual enrichment, a vehicle for establishing friendship between individuals and solidarity between peoples, it should therefore be treated with respect to these values.

8. NEED OF A COMMON LANGUAGE

These communication problems bring us back to the problem of a 'common language' and the need for 'bridges' between the two sectors. A significant step would be taken if each sector began putting the other one on its agendas, as we have recommended and this happened regularly and later perhaps systematically. Beyond this our feeling is that two other actions need to be linked to that to create positive change. The first is targeted events, briefings and workshops involving relevant actors from both sectors together so that common understandings and eventually a 'common language' can be developed. One cannot exaggerate how important such activity will be specifically in terms of developing methods and models of achieving the right 'fit' between what the CCS/CCI sector has to offer the tourism sector in terms of contributing to the development of innovative tourism products, services, events and experiences. As mentioned earlier, the drivers for both sectors are often quite different. To take a simplistic example, the typical commercial and business-oriented tourism person is possibly not interested in innovation per se, the interest will be there only if it is going to improve his/her profits, produce competitive edge or address a specific service or product problem. On the other hand the typical CCS/CCI person is possibly going to be interested in innovation simply because it is new and not whether it has applied profit-making or business-linked purpose.

The second of the actions needed is, we believe, to build a cadre of people who can be trained and developed to be de facto 'producers' able to work in both the sectors. An experimental project, Luova Matka, along these lines, is currently taking place in Finland. Such a training and development programme requires, apart good project design, time and funding. It will be very important and interesting to look at any mid-project or end-of-project evaluations of Nuova Matka.

We recommend that wherever and whenever possible targeted events, briefings and workshops should be encouraged and facilitated that involve actors from both sectors so that common understandings and eventually a 'common language' can be developed. This should be done bearing in mind that the motivations and outlook of actors in each of the sectors may differ quite significantly and present a real barrier even if some kind of initial engagement is achieved. Again the general message is the need for platforms, platforms and more platforms - of different types and at different levels.

The second recommendation which we believe to be very important, even though we have only covered it briefly, is the need for the training of cultural/CCI-tourism producers, who can work in both sectors and can be part of the 'bridges' that need to be built. We have covered this issue only briefly as it should be examined in the context of the current Luova Matka project from which a lot can probably be learnt e.g. should the producers who are to be trained and developed be from the CCS/CCI sector or from both sectors and so on?

It will be clear from the country reports that the definition and positioning of the CCS/CCI sector varies from country to country and also includes the fact that in some cases the driver for their development is at national level, in other cases at regional or local level. It is also clear from those reports that ownership of the CCIs in terms of policy, development and funding also varies and can be in one country purely the ministry of culture, in another the ministry responsible for SMEs and in another the ministry/agency responsible for innovation or for the creative economy. In a regional context and when trying to make recommendations this throws up problems. It is our belief that if stimulating the contribution of the CCS/CCI to tourism innovation is going to be achieved then some form of active incentivisation narrowly targeted at developing new forms of cooperation between the CCS/CCI and tourism sectors is going to be essential. This does not mean that nothing at all is happening at present but when it is, it is happening within the context of wider programmes or funding schemes not specifically focussed on the CCS/CCI and tourism sector relationship.

There are some very good arguments for treating CCIs like other businesses or innovation projects and not singling them out for special treatment as a 'sector'. One of the main arguments is of course that if they have to compete it is likely to make the successful ones stronger while if they are given special treatment there is a danger that things which are seriously viable may receive scarce funding. While accepting that as a valid general argument, we believe however that only if incentivisation is narrowly targeted specifically at nurturing the CCS/CCI-tourism sector relationship the beginning of a process of greater engagement and innovative, synergistic interaction is unlikely to make much progress.

A further recommendation therefore is that not only is incentivisation needed but it should be focussed specifically at nurturing the CCS/CCI-tourism sector relationship and not be part of a wider or more general and existing programme of incentivisation.

9. INCENTIVISATION TOOLS

When it comes to the question of the form of incentivisation needed there are various tools that could be used in many of the countries there has been investment in a system of incubators and accelerators which could be utilised either by having an incubator and accelerator dedicated specifically to development of innovative CCS/CCI-tourism initiatives and projects or where there is a special and dedicated programme within the wider remit of the incubator and accelerator. We believe however that the most effective form of incentivisation is going to be through a dedicated voucher scheme.

Voucher schemes already exist in the Northern Dimension region although in some cases they are at an early stage of development. There has been however, if one looks more widely in Europe, many examples of experience of positive experience of voucher schemes including of four which were carefully piloted under an EU programme. If properly designed, and that is where the European experience can help, vouchers can be effective in raising awareness among companies of potential service providers such as universities, or in our particular case, CCIs. In general learning to collaborate with service providers may lead to extended relationships once sufficient trust has been built using the voucher. The advantage of establishing a voucher scheme specifically linked to CCIs is that if appropriately matched with tourism industry companies, CCIs can provide close-to-market services, for example through design.

The key to a voucher scheme to encourage synergistic and innovative cooperation between CCS/CCI actors and tourism industry businesses will be ensuring that the request is coming from business-driven demand. It must not be a scheme which encourages service-driven supply which in reality simply represents an extra source of funding and interesting work for CCIs but does not fully meet the real needs of the tourism sector businesses.

The voucher scheme would therefore be targeted at tourism businesses with specific service or product needs, not at the CCS/CCIs although they would be beneficiaries. The design of the scheme would of course depend on the funding available but there would need to be a list of pre-selected CCS/CCI service providers from which the tourism businesses could select one appropriate to their needs. There would need to be of course too quite specific criteria as to which tourism businesses could potentially make use of the vouchers. Out of the evaluation of the four voucher schemes mentioned above that were part of an EU programme, there was some evidence to suggest that there are benefits in opening up such a voucher scheme internationally or regionally, in other words not confining it just to national, domestic CCS/CCI service providers.

If an 'opened-up' voucher scheme were introduced, in the context of the Northern Dimension area, a regional scheme could be interesting and attractive, or possibly less expensive and more manageable, a sub-regional experimental scheme involving just a few countries which could be tested as a prototype.

One important factor in favour of a voucher scheme for tourism businesses is that while in all countries funding is made available by the Ministry or national tourism agency for specific purposes, this is normally for representation abroad and export events and aimed at established tourism businesses and organisations. As far as we could tell in the time available for our research there was little evidence of specific industry-related funding for tourism start-ups or for people, within or without the tourism sector, who have an innovative tourism product or service which they wish to develop. Depending on the policy priorities, a voucher scheme could be not only filling a gap but appropriately promoted would produce ideas which would otherwise not have been developed at all.

We therefore believe incentivisation may best be achieved by 'tailored' adaptation of existing incubator/accelerator programmes but in particular by use of voucher schemes as just described.

One theme of this report is that the probable main reason for the CCS/CCIs not being more engaged within tourism in fostering innovative ideas, products, services and events is because it has not sufficiently been made an agenda item and has not received any real, practical attention. In this context one way of raising awareness and promoting innovative CCS/CCI-tourism cooperation might be to try to develop either a separate prize/award scheme or try to include a CCS/CCI-tourism synergy award within an existing scheme. The tourism industry already has an abundance of such annual prize/award schemes which seem to be popular and be of considerable interest to all industry actors. Prize/award schemes already exist, although perhaps to a less developed to degree in the CCI sector, for example prizes/awards for the best digital games or for the best festival within a given category. Such prizes or awards in specific categories which went to the best examples of innovative CCS-CCI tourism synergies could do much to stimulate more awareness and closer cooperation.

Experience, both collective and individual, is different in each of the countries, so are priorities. Assuming that developing CCS/CCI synergies with the tourism sector is of interest to a country we recommend that the NDPC encourages the setting up of small national working groups to study in depth and in a practical way how one, or perhaps two, specific CCS/CCI sub-sectors in their country could better engage with one specific and relevant area of tourism. Their experience and learning could then be shared appropriately, possibly at the annual NDPC forum.

We believe there could be benefit in setting up national working groups to look at how the relationship of one or two CCS/CCI sub-sectors with a specific and appropriate area of tourism could be better developed with a view to gaining a more practical understanding, which can be shared, of the detailed dynamics of actual and potential CCS/CCI-tourism cooperation.

Annual awards/prize schemes tend to be popular with sponsors so funding is often not the problem it tends to be in other areas. The NDPC has an annual forum and one wonders whether it would be possible and desirable to develop an NDPC annual awards competition specifically targeted at best examples of CCI-tourism cooperation and innovation, perhaps by category such as design, gamification, new festival etc. This could happen alongside attempts to get existing annual prize/award programmes to include a special CCS/CCI-tourism category.

We therefore recommend that attempts should be made to get existing annual prize/award programmes/schemes, especially those that are established in the tourism industry, to include a category which recognises and rewards examples of innovative achievement and successful synergies between the CCS/CCI and tourism sectors. In addition we wonder whether it would be desirable and feasible for the NDPC to explore setting up its own annual awards scheme as a new strand of its annual forum activity.

In some of the country reports we have applauded the very high level of cooperation happening between Northern Dimension countries but also how their approaches to CCS/CCI development differ. Although exchange of experience is already at quite high levels we wonder whether this could be pushed to a new level through an attachments scheme for staff from the region whose work in some way is partially or wholly connected with the CCS/CCI-tourism area. It would need to be thought through and would only involve a relatively small number of people but could be a useful form of professional exchange and personal professional development. The people involved would be from ministries (i.e. those responsible for CCI development, tourism planning etc) or national and regional tourism offices. They could spend perhaps three weeks working alongside a colleague in another country - long enough to gain a serious knowledge and understanding of policy and practice in that country but with the task of particularly focussing on aspects of the CCS/CCI-tourism relationship.

We recommend that there should be exploration and discussion to ascertain whether a small programme for attachments to work with a relevant colleague in another country would take current cooperation related to CCS/CCI-tourism issues to a higher level.

We mentioned that at the outset of our work a number of interesting, sometimes challenging, questions arose. One of them was the 'direction' of the CCS/CCI-tourism sector relationship including in terms of supply and demand. The title given to the project suggested, certainly unintentionally that it was a one-way street from the CCS/CCI sector which had something to offer to the tourism industry as recipient. In reality of course the relationship has to be two-way if it is to work effectively. It is also essential to keep in mind that the tourism industry is for the most part business-led, highly commercialised and profit-focussed. This means that for increased engagement between the two sectors it is the demand-side of the equation which will define the relationship, not the supply-side. It is particularly important to understand this as the CCS/CCI sector tends often to be supply-driven. This means that what will be most in demand is CCS/CCI abilities and skills, not just 'creative ideas'. It is probable that there are just as many unharvested creative ideas in the fragmented tourism sector as could come from the CCI sector. What is needed between the two sectors is the building up of new methods, models and paradigms for innovative and entrepreneurial b-2-b productisation.

We would like to conclude by making a general comment on the way forward. We hope that these reports will contribute to some forward movement but returning to the supply/demand issue, we believe that the whole area of tourism sector demand and expectations should be the primary focus in any further studies or work related to how the CCS/CCIs can foster innovation in tourism.

PART 2. RECOMMENDATIONS

1. In breaking down the very general notion of how the CCIs could foster innovation in the tourism sector into 'bite-sized' chunks, as a first step it would seem that heritage tourism, creative tourism and events tourism are likely to be the three most productive areas in which models and methods for cooperation can most easily be developed.
2. Each CCS/CCI sub-sector needs to be seen and treated in its own context when looking to create synergistic links between it and the tourism sector. One size will not fit all.
3. In order to stimulate a process and develop methods and models of encouraging the CCS/CCI and tourism sectors to work together innovatively, practical action needs to be taken in a narrowly-focussed way or, as described earlier, in 'bite-sized chunks'. To this end we would recommend that any practical action taken should in the early stages be limited in scope in terms of which CCIs or 'areas' should be targeted. It would seem to us those areas with the most potential or where productive engagement might be easiest, include: design, general apps development, development of and engagement with new and existing festivals (including small local or community ones), development of existing and new routes and trails, innovative approaches to visitor experiences at heritage sites, UNESCO Creative Cities Network, use of European Capital of Culture opportunities and similar significant national anniversary events, museums, digital games and gamification.
4. Specifically in relation to gamification and areas within in it such as development of certain types of mobile location-based tourism products and services, we would recommend that the NDPC looks at the possibility of encouraging the holding of seminars and workshops, similar to the UNWTO one mentioned above on 'Mobile Technologies for Improving the Tourism Experience', in order to increase understanding of this area's potential and to use such events to begin to create a shared agenda between the existing and fledgling games industries in the region and the tourism sector.
5. We recommend that the NDPC should consider whether creative tourism, and promotion of understanding of it and its potential, might become a major strand of its activity over the next couple of years. It could also offer a practical platform on which to bring CCS/CCI and Tourism sector actors together.
6. If in the Northern Dimension region harnessing the potential of the CCS/CCI sector to the tourism industry is seen as important or a priority it is unlikely that much practical progress will be achieved without very specific recognition of that in relevant policies which ideally should include those related to tourism, innovation and to CCS/CCIs.
7. We recommend that within each of the respective sectors, tourism and CCS/CCIs, leaders and activists at all levels try to encourage as much as possible relevant issues and developments related to the other sector are put on the agendas of working groups, at professional gatherings and conferences and at industry events.16 Along with this, there should be more effort made to organise joint events and presentations related to areas where there could be obvious mutual benefit for both sectors. During the course of our work we found examples of where, for example, there was a specialist national advisory group for cultural tourism but without anyone from the CCS/CCI sector on it, not even as an observer. Similarly there were cases of CCS/CCI events with a tourism dimension where no travel and tourism representatives were invited, again not even as observers.

[16] The travel and tourism industry is particularly well-endowed with well-organised representative bodies, interest groups and industry events. In general a continuing attempt should be made to turn the CCIs-tourism sector relationship into an agenda item in this contexts. One random example might be the World Tourism Forum Lucerne which is an example of a leading industry platform where CEOs, ministers, academia, finance, start-ups, the next generation and young talent address the future challenges of the travel, tourism and hospitality industry.

8. We recommend that wherever and whenever possible targeted events, briefings and workshops should be encouraged and facilitated that involve actors from both sectors so that common understandings and eventually a 'common language' can be developed. This should be done bearing in mind that the motivations and outlook of actors in each of the sectors may differ quite significantly and present a real barrier even if some kind of initial engagement is achieved.
9. We recommend to consider the need for the training of cultural/CCI-tourism producers, who can work in both sectors and can be part of the 'bridges' that need to be built. We have covered this issue only briefly as it should be examined in the context of the current Luova Matka project from which a lot can probably be learnt e.g. should the producers who are to be trained and developed be from the CCS/CCI sector or from both sectors and so on.
10. Incentivisation is not only needed but it should be focussed specifically at nurturing the CCS/CCI-tourism sector relationship and not be part of a wider or more general and existing programme of incentivisation. Incentivisation may best be achieved by 'tailored' adaptation of existing incubator/accelerator programmes but in particular by use of voucher schemes as just described.
11. It could be benefit in setting up national working groups to look at how the relationship of one or two CCS/CCI sub-sectors with a specific and appropriate area of tourism could be better developed with a view to gaining a more practical understanding, which can be shared, of the detailed dynamics of actual and potential CCS/CCI-tourism cooperation.
12. Attempts should be made to get existing annual prize/award programmes/schemes, especially those that are established in the tourism industry, to include a category which recognises and rewards examples of innovative achievement and successful synergies between the CCS/CCI and tourism sectors. In addition we wonder whether it would be desirable and feasible for the NDPC to explore setting up its own annual awards scheme as a new strand of its annual forum activity.
13. There should be exploration and discussion to ascertain whether a small programme for attachments to work with a relevant colleague in another country would take current cooperation related to CCS/CCI-tourism issues to a higher level.

PART 3. STATISTICS AND GRAPHIC PRESENTATIONS OF CROSS-COUNTRY DATA

Appendix A. Prioritisation of Travel and Tourism Industry in NDPC countries[17]

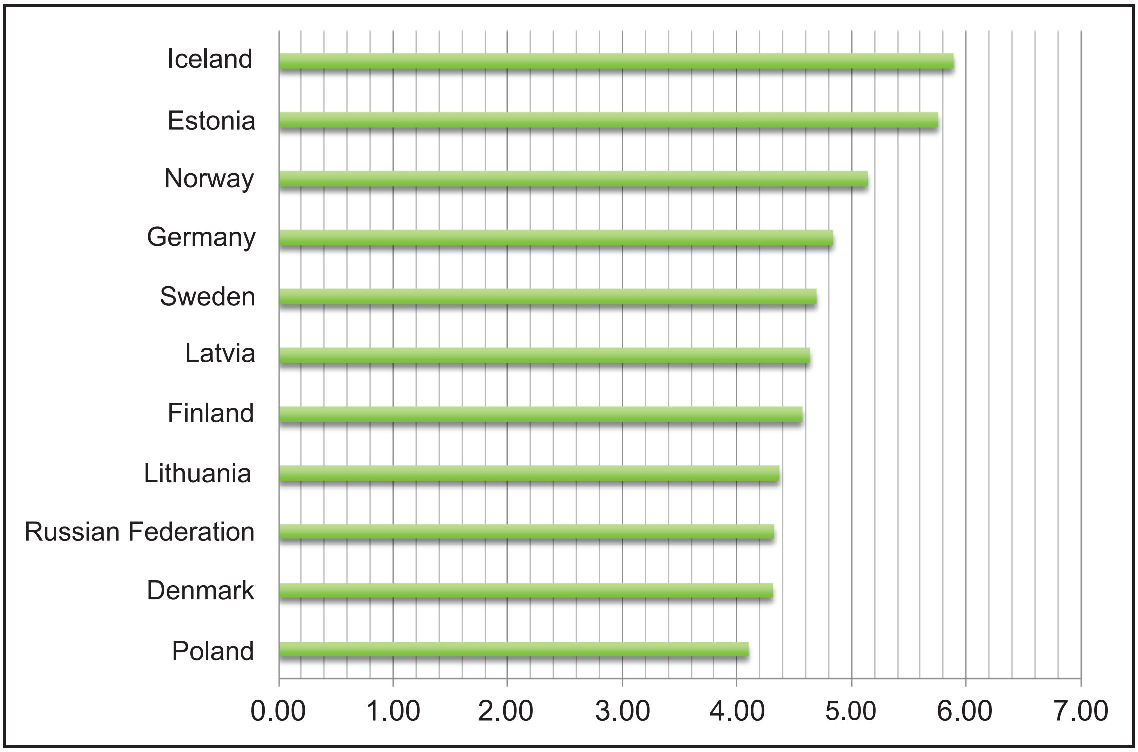
Table 1: Prioritisation of Travel and Tourism Industry by NDPC countries governments

Ranking according to the 2015 World Economic Forum Travel and Tourism Report: 4-4, 50 = average performance, 4,50-5,50 = strong performance, over 5,50= very strong performance

Country	Prioritisation of Travel and Tourism Industry
Poland	4.10
Denmark	4.31
Russian Federation	4.33
Lithuania	4.37
Finland	4.57
Latvia	4.64
Sweden	4.70
Germany	4.84
Norway	5.14
Estonia	5.76
Iceland	5.89

[17] Data Source: World Economic Forum WEF_Global_Travel&Tourism_Report_2015 – Graphs Lila Skarveli

Figure 1: Prioritisation of Travel and Tourism Industry by NDPC countries' governments[18]



[18] Prioritization of Travel & Tourism (6 indicators): The extent to which the government prioritizes the T&T sector has an important impact on T&T competitiveness. By making clear that the sector is of primary concern, the government can channel funds to essential development projects and coordinate the actors and resources necessary to develop the sector. Signaling the stability of government policy can affect the sector's ability to attract further private investment. The government can also play an important role in directly attracting tourists through national marketing campaigns. This pillar includes measures of government spending, effectiveness of marketing campaigns and country branding, and the completeness and timeliness of providing T&T data to international organizations, as this indicates the importance that a country assigns to its T&T sector - World Economic Forum WEF_Global_Travel&Tourism_Report_2015: T&T Policy and Enabling Conditions

Appendix B. Effectiveness of marketing and branding to attract tourists in NDPC countries[19]

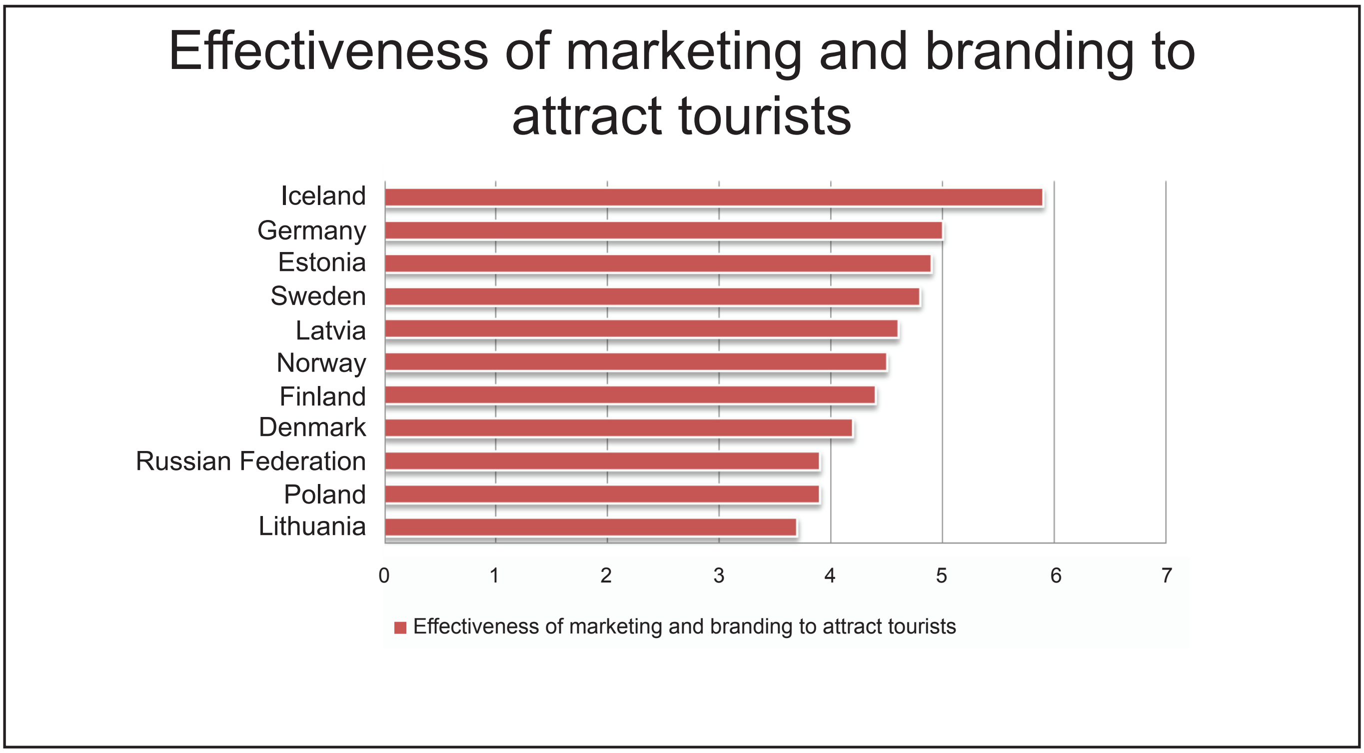
Table 2: Effectiveness of marketing and branding to attract tourists in NDPC countries

Ranked by the World Economic Forum Travel and Tourism Competitiveness Report 2015 from 1-7 (1=worst score, 7 = best score)

Country	Effectiveness of marketing and branding to attract tourists
Iceland	5.9
Germany	5.0
Estonia	4.9
Sweden	4.8
Latvia	4.6
Norway	4.5
Finland	4.4
Denmark	4.2
Poland	3.9
Russian Federation	3.9
Lithuania	3.7

[19] Data Source: World Economic Forum WEF_Global_Travel&Tourism_Report_2015/ Graphs Lila Skarveli

Figure 2: Effectiveness of marketing and branding to attract tourists in NDPC countries



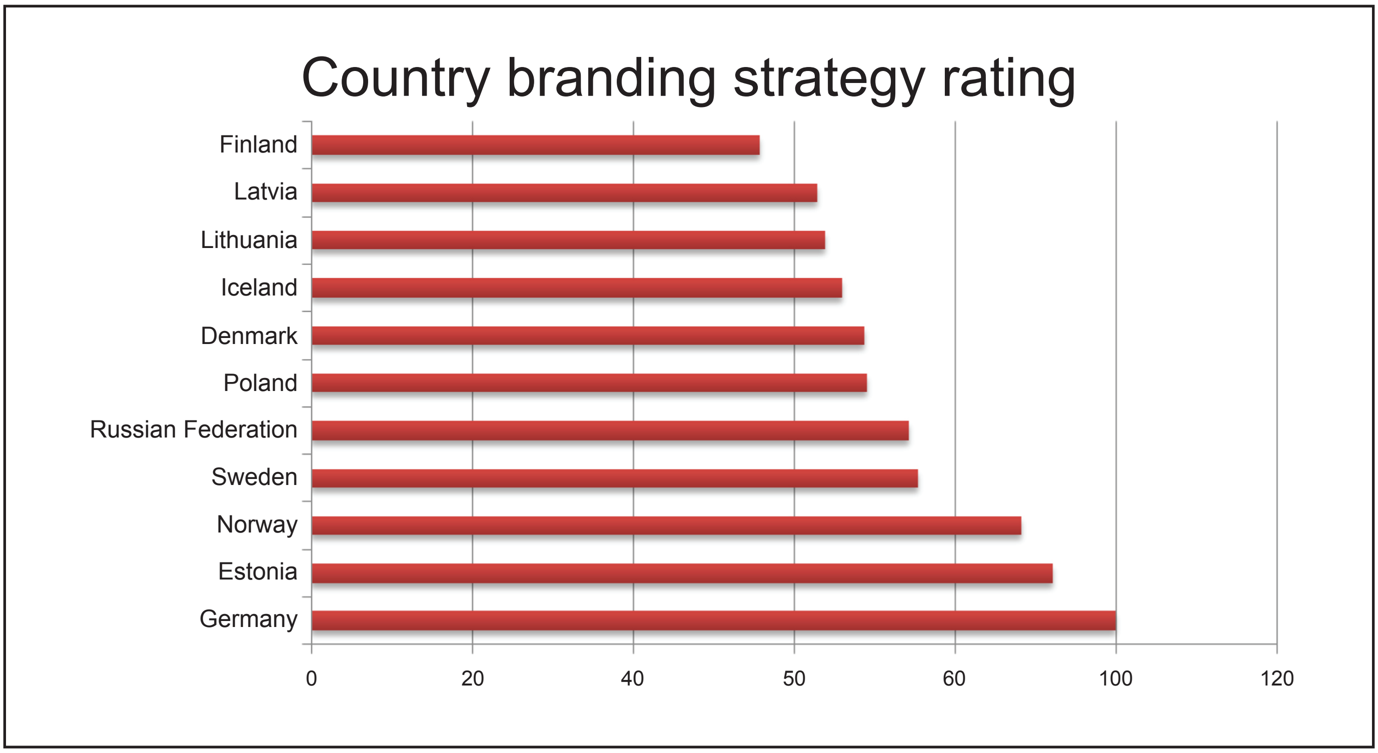
Appendix C. Country branding strategy rating [20]

Table 3: Country branding strategy ranking based on data from the World Economic Forum Travel and Tourism Competitiveness Report 2015

Country	Country branding strategy rating[21]
Germany	100
Estonia	92.2
Norway	88.3
Sweden	75.4
Russian Federation	74.3
Poland	69.1
Denmark	68.7
Iceland	66.0
Lithuania	63.9
Latvia	62.9
Finland	55.8

Figure 3: Country branding strategy rating (rank /141)

[20] Data Source: World Economic Forum WEF_Global_Travel&Tourism_Report_2015 – Graphs Lila Skarveli
[21] Ranking: country's position on a total of 141 – Data: ibid 20


Country branding strategy rating
Finland
Latvia
Lithuania
Iceland
Denmark
Poland
Russian Federation
Sweden
Norway
Estonia
Germany
0
20
40
50
60
100
120

Appendix D. Travel and Tourism as % of GDP in NDPC countries[22]

Table 4: Travel and Tourism as % of GDP and Growth forecast

Country	Travel and Tourism as % of GDP	Growth forecast
Denmark	2.0	3.4
Estonia	3.4	3.7
Finland	2.3	3.4
Germany	1.7	1.8
Iceland	6.8	3.2
Latvia	2.9	5.8
Lithuania	1.8	5.2
Norway	2.8	2.8
Poland	2.1	5.2
Russian Federation	1.4	3.9
Sweden	2.7	4.3

[22] Data Source: World Economic Forum WEF_Global_Travel&Tourism_Report_2015

Figure 4: Travel and Tourism as % of GDP and Growth forecast

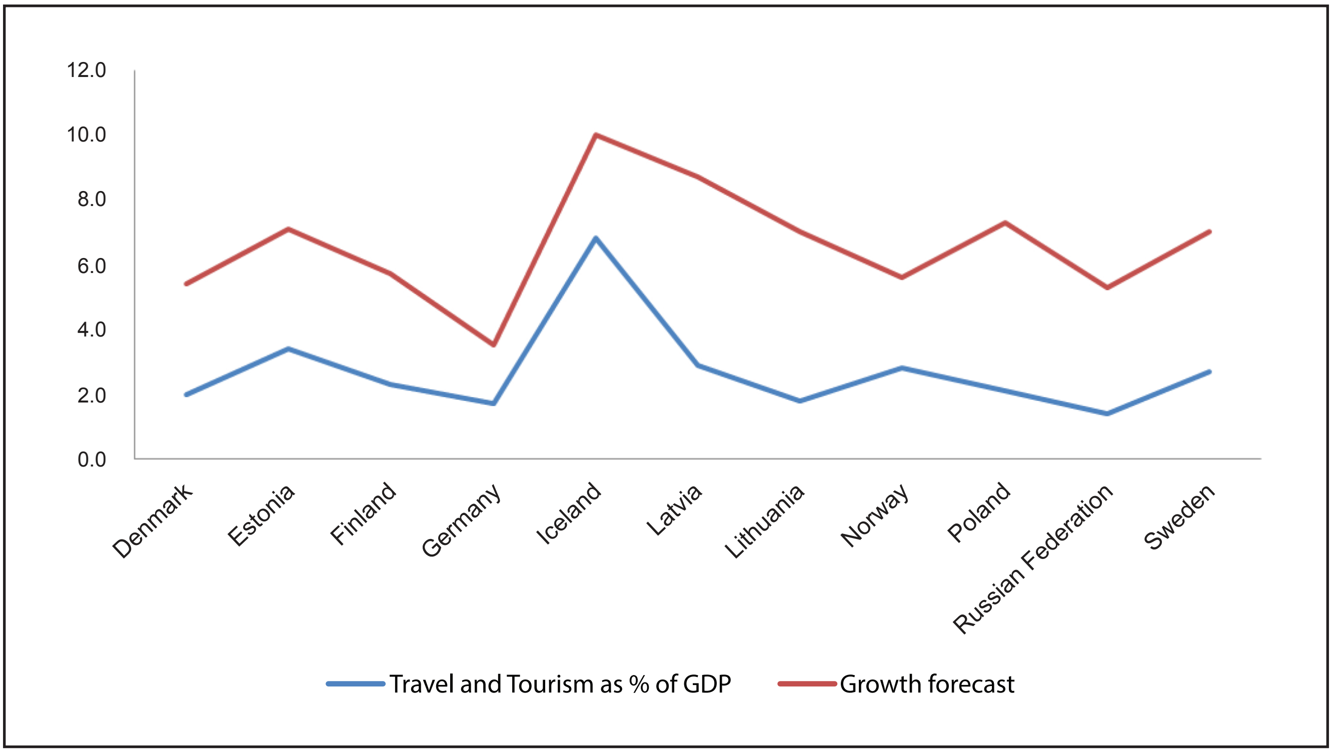


Figure 5: Travel and Tourism as % of GDP

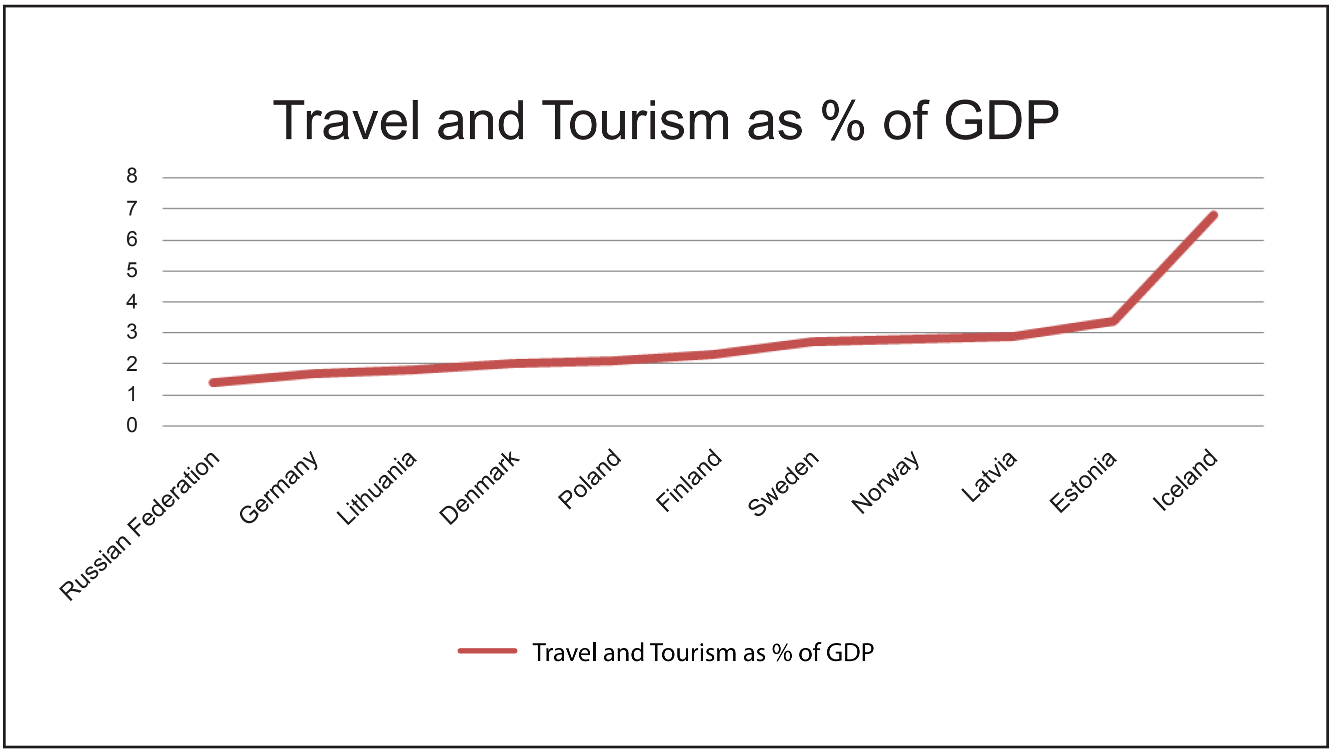
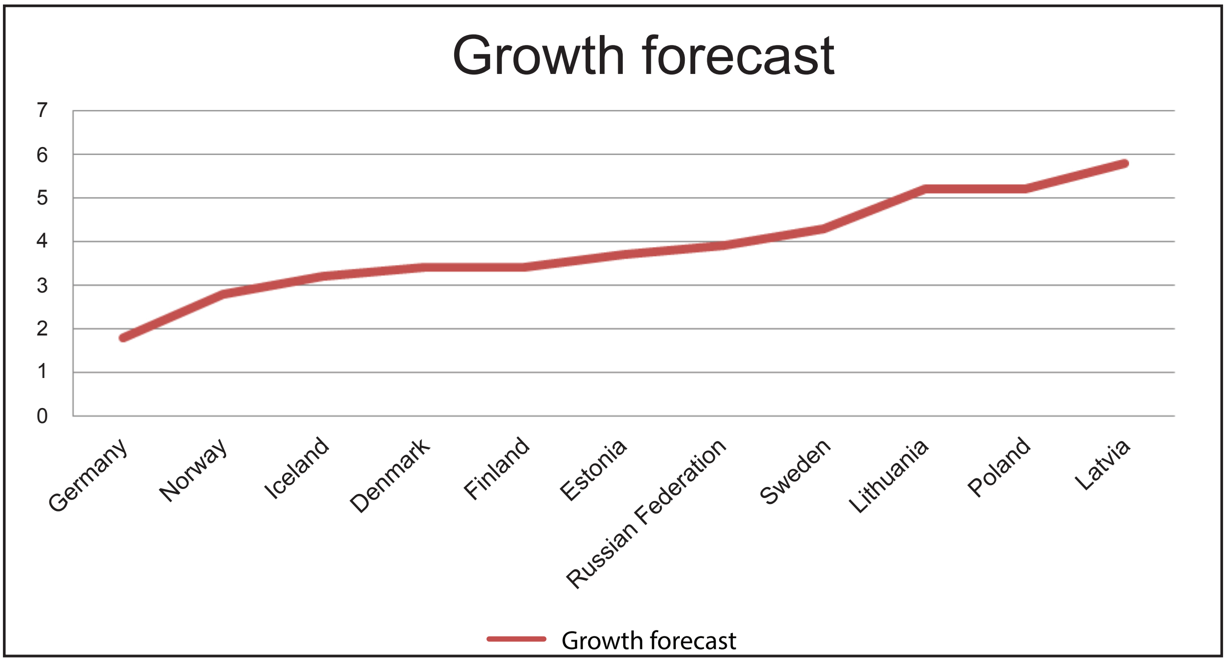


Figure 6: Travel and Tourism growth forecast



Appendix E. International Cultural Cooperation - NDPC countries[23]

Table 5: International Cultural Cooperation in Europe: Organisation and Trends

Country	Lead Ministry / Ministries in charge of international cultural cooperation	Bodies/agencies charged with promoting international cultural relations	Membership in regional co-operation bodies relevant for culture	Recent priorities and trends
Denmark	SR Min. of Foreign Affairs; Min. of Cultural Affairs	The Danish Cultural Institute (BR: 10 countries); Danish Arts; Danish Center for Culture and Development; Embassies	NDPC, Nordic CoM; Baltic Cooperation	CF: Asia (Bangladesh, China, Vietnam); Baltic States; Benelux; Germany; Hungary; Poland; Russia; UK
Estonia	SR Min. of Culture; Min. of Foreign Affairs; Min. of Education and Research	Estonian Institute (BR: 4 countries); Tuglas Society; Embassies	NDPC, Baltic Cooperation	CF: Finland and Scandinavian countries; the other Baltic states; Hungary.
Finland	SR Min. of Foreign Affairs; Min. of Education and Culture	Finish cultural and academic institutes (in 16 countries); Embassies	NDPC, Nordic CoM; the Barents Regional Council; the Council of the Baltic Sea States (CBSS)	Cultural exports have become a major ICC policy issue. Nordic and Nordic-Baltic -co-operation is being renovated. Enhanced efforts for cultural co-operation with China and countries of South-East Asia.

[23] Data source : http://www.culturalpolicies.net/web/icc-tables.php?aid=27&cid=44&lid=en – Graphic presentation Figure 7 on page 47 of this report; No data available for Iceland

Country	Lead Ministry / Ministries in charge of international cultural cooperation	Bodies/agencies charged with promoting international cultural relations	Membership in regional co-operation bodies relevant for culture	Recent priorities and trends
Germany	Federal Foreign Office; in some fields, e.g. European co-operation, SR with *Länder* Governments; Fed. Chancellor's Office etc.	Goethe Institute (BR: 81 countries + additional information and learning centres, reading rooms etc.); Institut f. Auslandsbeziehungen (Ifa); Embassies; Local / Regional Bodies and NGOs	NDPC, Baltic Cooperation, Alps-Adria	In 2006, major conferences were held to highlight a new political importance attributed to ICC (incl. language teaching) and to discuss future developments. The now higher place on political agendas was underlined by increases in the federal budget. Regional focus: EU countries; Asia (China, India); Eastern and Central Europe; Middle East

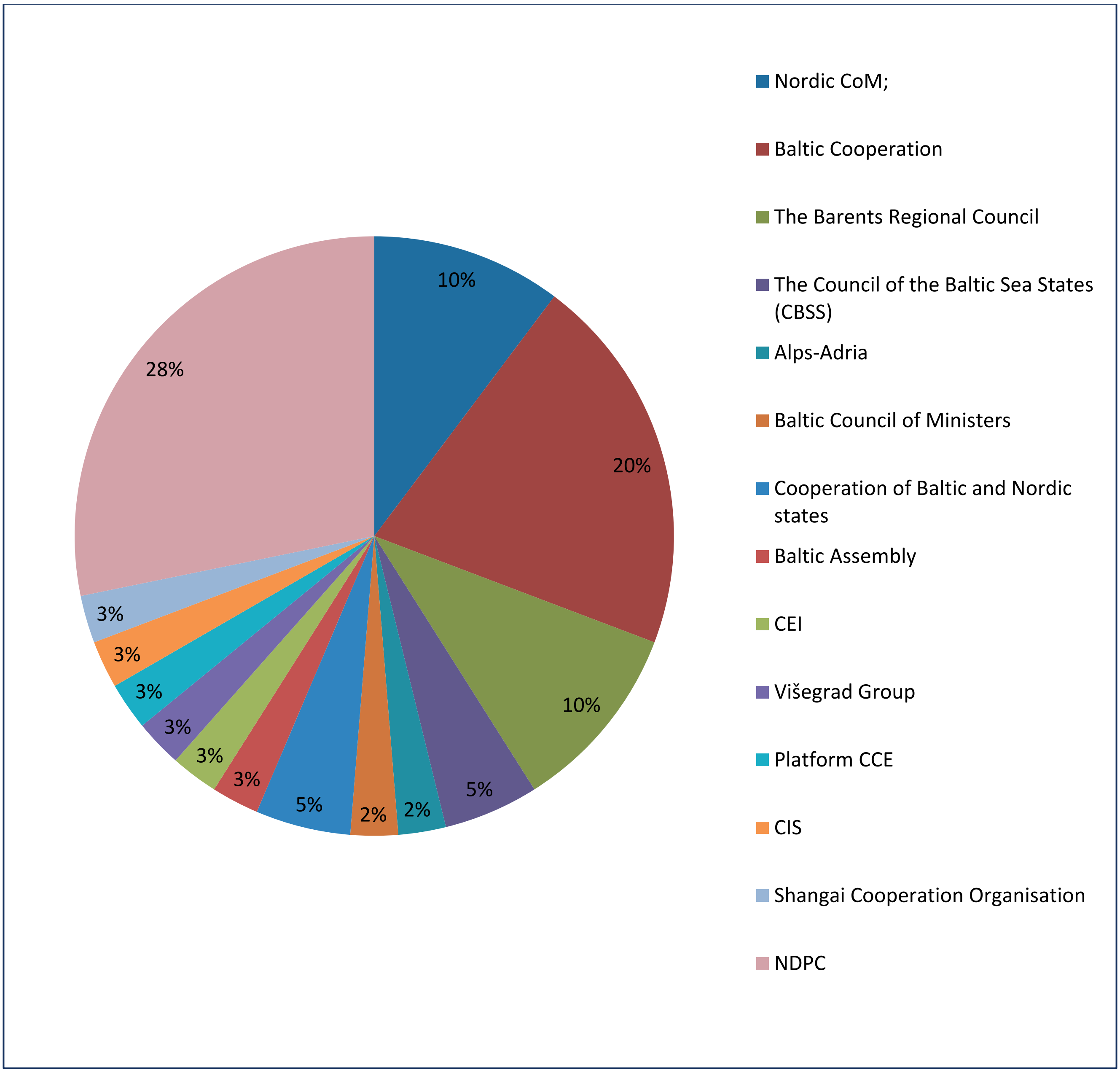
Country	Lead Ministry / Ministries in charge of international cultural cooperation	Bodies/agencies charged with promoting international cultural relations	Membership in regional co-operation bodies relevant for culture	Recent priorities and trends
Latvia	Min. of Culture	Embassies, The Latvian Institute	NDPC, Baltic Assembly, Baltic Council of Ministers, Baltic Council, Council of the Baltic Sea States, cooperation of Baltic and Nordic states.	"The Cultural Policy Guidelines 2006 - 2015" set the vision for the development of Latvian international co-operation as being: 1) sustainable cultural exchange, based on co-operation projects and co-productions, thus furthering the professionalism of cultural operators, and encouraging creativity and excellence in all cultural branches; 2) increasing recognition and competitiveness of Latvian cultural products; 3) Latvia actively participating in and contributing to the cultural processes in the EU and the wider international community.
Lithuania	SR Min. of Foreign Affairs; Min. of Culture	The Lithuanian Institute; Embassies	NDPC, Baltic Cooperation	CF: Baltic sea countries; Russia (Kaliningrad region). Important émigré centres in the West.

Country	Lead Ministry / Ministries in charge of international cultural cooperation	Bodies/agencies charged with promoting international cultural relations	Membership in regional co-operation bodies relevant for culture	Recent priorities and trends
Norway	SR Min. of Foreign Affairs; Min. of Culture and Church Affairs	Embassies; Office for Contemporary Art Norway (OCA); Music Information Centre Norway (MIC); NORLA - Norwegian Literature Abroad; Norwegian Film Institute (NFI); etc.	NDPC, Nordic CoM; Barents Regional Council; Baltic Cooperation	Main fields: Artistic exchanges and promotion of Norwegian artists and works of art; Culture as a core component of intra-Nordic co-operation; Cultural diversity and globalisation issues
Poland	SR Min. of Culture and National Heritage; Min. of Foreign Affairs	Polish Institutes (BR: 16 countries); Adam Mickiewicz Institute; International Cultural Centre; Embassies; Polish Information and Foreign Investments Agency; The Permanent Conference of Museums, Archives and Polish Libraries in the West; *Gaude Polonia; Borderland Foundation...*	NDPC, CEI; Baltic Cooperation; Platform CCE; Višegrad Group	Polish ICC is shaped by its specific geographical location, by economic and political interests as well as by the role of a large "Polish Diaspora". CF: Belgium, Austria, France, Germany and other member states of the EU; USA; Israel ("Jewish Diaspora"); the Baltic Region and countries on Polands Eastern border (Ukraine, Russia, Belarus, the latter via non-governmental bodies). State bilateral co-operation is gradually replaced by activities of European institutions and artistic or NGO initiatives.

Country	Lead Ministry / Ministries in charge of international cultural cooperation	Bodies/agencies charged with promoting international cultural relations	Membership in regional co-operation bodies relevant for culture	Recent priorities and trends
Russian Federation	Min. of Foreign Affairs (MFA) negotiates general framework; Min. of Culture addresses practical issues	Embassies; Federal Agency for the CIS, Compatriots Living Abroad and for International Humanitarian Cooperation under the MFA and its Centres for scientific and cultural co-operation abroad; Russian Association for International Co-operation; "Russian World" Fund , etc.	NDPC, Baltic Cooperation; Barents Regional Cooperation; BSEC; Nordic Council; Commonwealth of Independent States (CIS); the Shanghai Co-operation Organisation and other	Strengthening the cultural component in international relations; Promotion of Russian language and culture abroad Bilateral exchange agreements with many countries all over the world; Development of cultural interactions between the CIS member states; Strengthening cross-border cultural co-operation; Deepening relations with compatriots living abroad.

Country	Lead Ministry / Ministries in charge of international cultural cooperation	Bodies/agencies charged with promoting international cultural relations	Membership in regional co-operation bodies relevant for culture	Recent priorities and trends
Sweden	Min. for Foreign Affairs	Svenska Institutet (BR in Paris); Embassies; Nat. Council for Cultural Affairs; Swedish Internat. Development Authority (SIDA); Internat. Artists Studio Programme (IASPIS); other agencies	NDPC, Nordic CoM; Barents Regional Cooperation; Baltic Cooperation	"Cultural Policies for Development" concepts, with close links to local life, culture, and the environment, shape ICC and lead to programmes e.g. in Africa, the Mediterranean and Eastern Europe. A strong tradition of Nordic cooperation is complemented by better relations with the whole Baltic region (e.g. in "Ars Baltica" exchanges).

Figure 7: Membership of NDPC countries in regional co-operation bodies relevant for culture



Appendix F. Number of registered World Heritage Cultural sites and Intangible Cultural Expressions in NDPC countries[24]

Table 6: Number of registered World Heritage Cultural sites and Intangible Cultural Expressions in NDPC countries

Country	Number of World Heritage cultural Sites	Number of Intangible cultural expressions registered
Denmark	3	0
Estonia	2	4
Finland	6	0
Germany	36	0
Iceland	1	0
Latvia	2	2
Lithuania	4	3
Norway	6	0
Poland	13	0
Russian Federation	16	2
Sweden	14	0

[24] Data Source: http://whc.unesco.org/en – Graphics Lila Skarveli

Figure 8: Number of World Heritage Cultural Sites

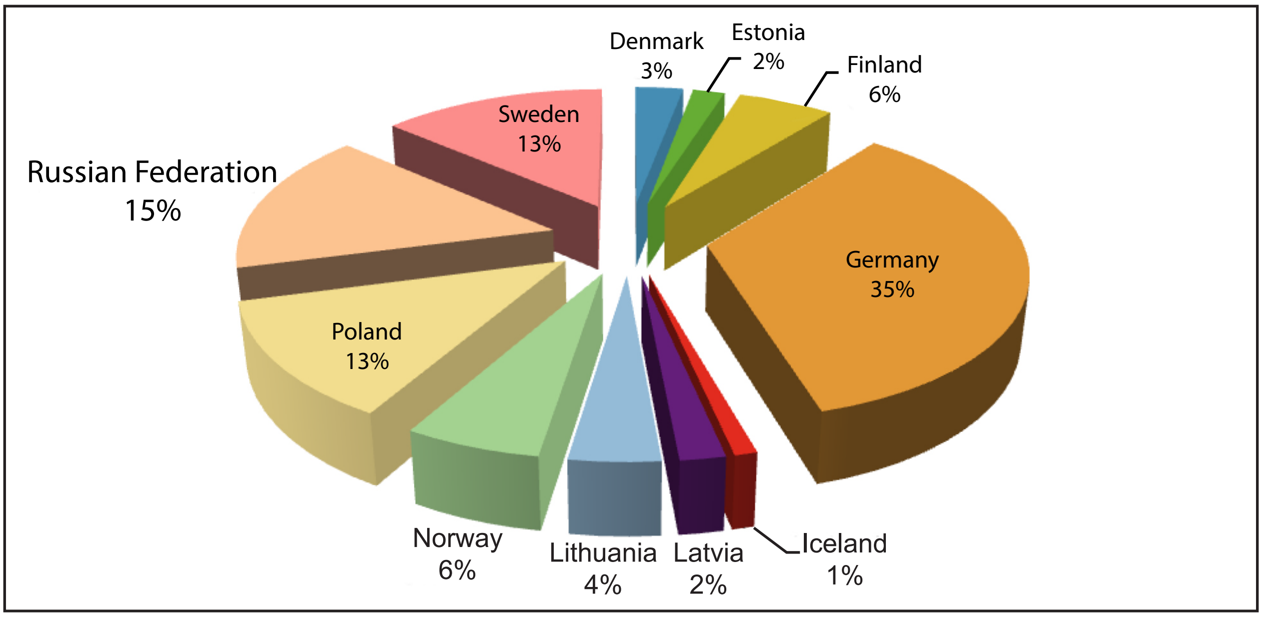
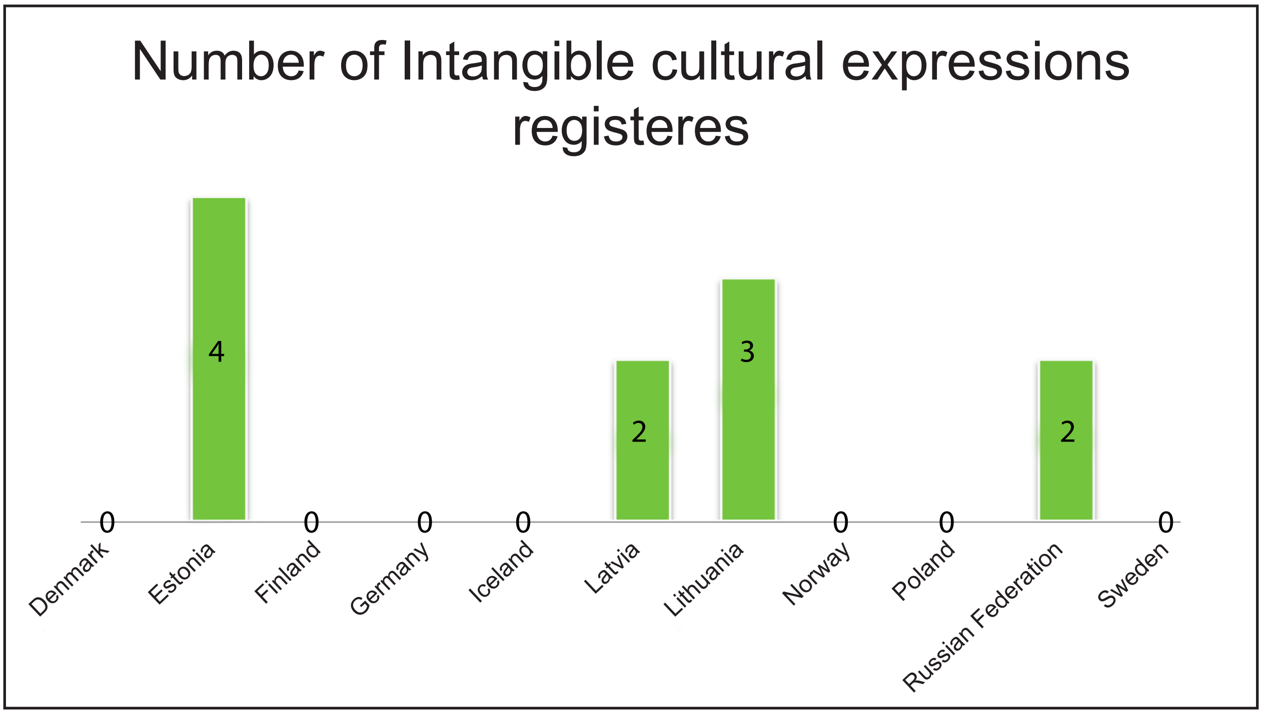


Figure 9: Number of intangible cultural expressions registered[25]



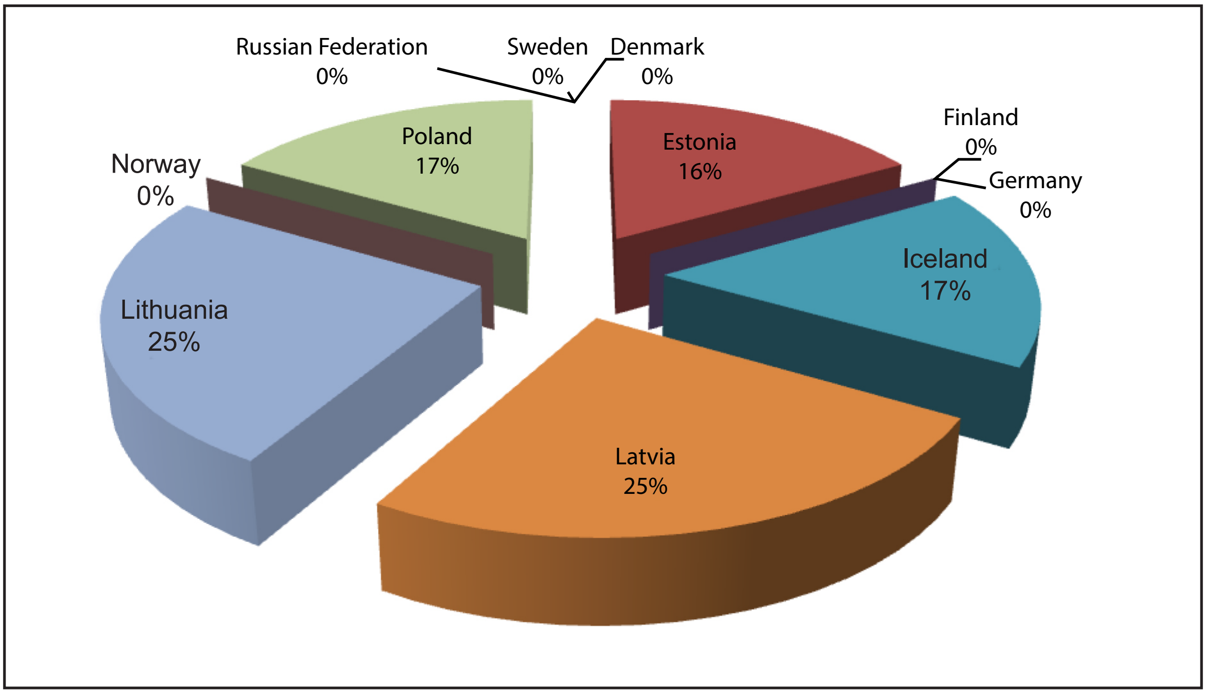
25 Data source http://www.unesco.org/culture/ich/en - Graphics Lila Skarveli

Appendix G. EDEN: European Destinations of Excellence

Table 7: NDPC countries awarded (2011-2015)[26]

2015: Tourism and local gastronomy	2013 Accessible tourism	2011 Tourism and regeneration of physical sites
Estonia, Hiiumaa	Estonia, Haaspalu City	Estonia, Lahemaa National Park Manors
Iceland, Skagafjordur Food Chest	Latvia, Liepaja	Iceland, Stykkisholmur Municipality
Latvia, Latgale region	Lithuania, Telsiai	Latvia, Ligatne Village
Lithuania, Jaskonys, Druskininkai municipality	Poland, Przemysl	Lithuania, Rokiskis Manor
Poland, the Silesian tastes Cultural route		Poland, Zyrardow

Figure 10: Percentage of EDEN awards per NDPC countries between 2011 and 2015



26 Source: https://ec.europa.eu/growth/tools-databases/eden_en - Graphs Lila Skarveli

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