

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



Country Report – Germany



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LIST OF ABBREVIATIONS

| Acronym/abbreviation | Meaning |
|----------------------|--|
| CCI | Cultural and Creative Industries |
| CCS | Cultural and Creative Sectors |
| DCCD | Danish Centre for Cultural Development |
| DKI | Danish Cultural Institute |
| DKK | Danish Krone (Danish local currency) |
| EEC | European Economic Community |
| EU | European Union |
| ND | Northern Dimension |
| NDPC | Northern Dimension Partnership on Culture |
| OECD | Organisation for Economic Co-operation and Development |
| OTA | Online Travel Agencies |
| SME | Small and Medium Enterprise |
| UNCTAD | United Nations Conference on Trade and Development |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| WTO | World Trade 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.

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- 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'.

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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

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

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- 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
- 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?

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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.

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,

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events and through industry information channels. Awareness-raising is also needed in the opposite direction by making CCIs more aware of the importance and potential of the tourism sector as a partner and market for creative industries' goods and services. This needs to be done through making it a practical agenda item at CCI events and gatherings and through 'word of mouth'. There is also a need simply to bring tourism and CCI professionals together to create 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 'Gettyisation'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

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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This already important discernible movement to a new form of individualised, co-created tourism opens up real and innovative opportunities for the cultural and creative sectors to explore and establish new and active relationships with the tourism sector. As is made clear in the regional/cross-country report it will require practical intervention and certain types of support as for all their similarities in terms of being quintessential post-industrial economic sectors, the CCIs and the tourism industry do not speak the same language. Focussing on how bridges can be built between 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 related to Germany include:

- There is no binding definition of culture that could serve as the basis for cultural programmes and measures
- Cultural policy in Germany is based on a federal model and governed by the principles of decentralization, subsidiary and plurality
- Cultural events are considered as major promotional tools and therefore important elements in the economic policies of cities and tourist regions – this constitutes a tacit link between CCIs and tourism
- Cultural and creative industries are consisting of 11 submarkets: music industry, book market, art market, film industry, broadcasting industry, performing arts market, architecture market, design industry, press market, advertising market and software and games industry.

2. BASIC COUNTRY INFORMATION

a. Cultural policy evolution¹²

In contrast to most European countries, Germany was made up of many independent feudal states and city republics that each pursued their own cultural policies and established a host of cultural institutions. Among them were distinct cultural traditions that were not centralized nor assimilated in the German Empire (Reich), founded in 1871. While the new Reich government was responsible for foreign cultural policy, the constituent states retained responsibility for their own cultural policies. The special autonomy of the municipalities extended to the area of cultural affairs which was supported by a strong civic commitment to the arts and culture.

Under the new constitution of the Weimar Republic (1919-1933), public responsibility and support for the arts and culture was divided among the Reich government, the governments of the federal states (Länder), the city and municipal councils.

The approach adopted by the National Socialist regime (1933-1945) replaced the diversity that had evolved over the course of centuries with forced centralization, stifling civic commitment and 'instrumentalising' culture to serve the aims of the Regime. This experience with centralization later led to the emergence of a strong penchant for federalism in the Federal Republic of Germany.

The World War II ended on 8 May 1945. The German Reich was then divided into three Western and one Eastern occupation zones. These four zones eventually became two: the Federal Republic of Germany and the German Democratic Republic. Following a brief period marked by co-operation between the Federal Republic and the GDR, cultural policy evolved independently and developed along different lines in the two German states. This changed following Germany's reunification 40 years later on 3 October 1990.

The 1990s were profoundly influenced by the unification of Germany. In the new eastern federal states (Länder), adoption of the administrative structure of the "old" Federal Republic and its approach to cultural policy prompted a restructuring of and radical changes in the cultural landscape. These years have also been marked by austerity measures and budgetary constraints and by the increasingly evident structural problems of the major traditional cultural institutions.

In the early years of the following decade, cultural policy in Germany stabilized in comparison to the changes of the 1990s. However, cultural policy still faces great challenges and requires a constant re-orientation. The main issues are financial, particularly as the negative consequences of the recent global financial crisis on local and regional public budgets become more visible. On the other hand, some of these problems are structural in nature and concern the conceptional basis of cultural policy. Despite an improved state budget on the national level and in some of the federal states (Länder), there is on-going pressure on cultural institutions to increase their economic equity-ratio, to lead their institutions more economically, as well as to obtain funds from other sources such as sponsorship, patronage and marketing. In particular, the structural problems require a readjustment of the relationship between the state, market and society concerning the financing of cultural institutions, among other methods, through public private partnership models and a stronger integration of civic commitments. In addition, the conceptional basis of past cultural policies has been challenged by migration processes, rapid media development and a change in the composition of audiences (a decreasing total population and an increasing number of older people).

¹² Culturalpolicies.net

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Currently, intensive discussion is taking place in Germany on the requirements of cultural policies, due to these societal changes.

b. Definitions

There is no binding definition of culture that could serve as the basis for cultural programmes and measures in Germany. In contrast to the situation in the first two decades after the founding of the Federal Republic of Germany, one can safely say that the cultural philosophies of the democratic parties at all levels of government no longer significantly differ. One reason for this convergence is the intense cultural policy debate that began in the early 1970s in the context of the "New Cultural Policy". This debate led to a broadening of the narrow concept of culture prevailing in the 1950s and 1960s, which had been very strongly oriented towards the traditional cultural value system handed down for generations, to include new content and focus. The term "culture" today, thus encompasses contemporary creative and artistic activity (both inside and outside the framework of the traditional cultural institutions) as well as the culture of everyday life.

3. CULTURAL AND CREATIVE SECTORS/CCIS IN GERMANY

a. The German cultural policy model

Cultural policy in Germany is based on a federal model. It is governed by the principles of decentralization, subsidiary and plurality; a tradition rooted in the nation's historical development and reaffirmed in its Constitution.

An important objective influencing the development of cultural policy throughout Germany, is to find a balance between public-sector responsibility for ensuring the existence and funding of cultural institutions and programmes without government interference in cultural activities. The Constitution guarantees freedom of the arts (*Article 5 (3)*) which not only provides the basis for artistic autonomy and self-governing rights of cultural institutions and organizations but also stipulates a form of protection from state directives and regulation of content. Accordingly, the state is responsible for actively encouraging, supporting and upholding this artistic freedom in what is referred to as a *Kulturstaat* (cultural state).

This approach to cultural policy is primarily supply-oriented. This means that the majority of cultural infrastructure is governed under the rule of law and is supported by the government – mainly by the individual federal states (Länder) and by the municipalities. More recently, there have been discussions concerning the privatization of public services and institutions which has intensified efforts to promote more efficient arts management. As a result, there is a greater receptiveness to public-private partnership models and a willingness to privatize some cultural institutions.

For a number of years there has been an ongoing debate regarding a greater pooling of resources among the different levels of government. Prompted by the problematic financial situation of many federal states (Länder), the Federal Government has been called upon to co-finance "landmark cultural institutions". A precedent was set for its involvement in the 1990 *Unification Treaty* calling on the Federal Government to support cultural institutions located in the federal states (Länder) of the former GDR. This is especially important for cultural institutions located in the new capital city, Berlin, which face a plethora of structural and financial problems as a consequence of German unification and which require substantial support from Federal agencies. Along with additional obligations and competences, this Federal involvement gives agencies a greater say in cultural matters at the national level; a development that is contested by some of the federal states (Länder) on constitutional grounds.

Today, one of the main objectives of cultural policy in the Federal Republic of Germany ¹³to enabling as many people as possible to participate in arts and culture. Cultural policy as social policy deals with social challenges such as demographic trends, migration flows, handling value systems, financial development, economization, digitalization. In recent years, there has also been acknowledgment in the cultural field that Germany is a country of immigration. It has also been recognized that cultural policy – particularly at the municipal level – has to take this issue into consideration, which means taking multicultural diversity as a given, integrating the culture of immigrants into cultural policy and to take account of the cultural needs of people with migrant backgrounds.

¹³ Cultural Policy in the FDR - UNESCO Press <http://unesdoc.unesco.org/images/0000/000069/006935eo.pdf>

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b. Cultural and Creative industries¹⁴

The culture industries are a separate and autonomous pillar of cultural life in the Federal Republic of Germany. Generally, the cultural field is divided into three sectors: private cultural enterprises, state or municipal publicly financed institutions or activities like theatre, cultural heritage, monuments, libraries, museums, etc. and not-for-profit, intermediary organizations, foundations, associations etc.

According to the Conference of Minister of Economic Affairs and Energy in 2009 the cultural and creative industry consists of 11 submarkets: music industry, book market, art market, film industry, broadcasting industry, performing arts market, architecture market, design industry, press market, advertising market and software and games industry.

c. Inter-ministerial cooperation

There is no official body in charge of coordinating cultural policy initiatives, programmes and measures undertaken by all levels of government. The Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany (KMK) acts as a platform for co-operation and exchange among the federal states (Länder).

Co-operation platforms also exist at the municipal level through local authority associations such as the German Association of Cities, the German Association of Towns and Municipalities, and the Association of German Counties. These associations have created specialized divisions and cultural affairs committees to address specific topics which may also be relevant at the level of the federal states (Länderebene) and Federal levels (Bund). The sub-committees prepare recommendations which are submitted to the respective local authorities for consideration.

The office of the Federal Commissioner for Cultural and Media Affairs (BKM) cooperates with the KMK on specific subjects as needed. Regular communication takes place on a working level. Representatives of the BKM regularly attend meetings of the KMK's Committee for European and International Affairs and the Film Committee of the federal states (Länder).

Consultation and coordination of cultural policy between the federal states (Länder) and their municipalities is handled in a number of ways. In addition to bilateral contacts between the relevant ministry and individual municipalities, consultations take place between the ministry and the local authority associations on issues of significance for the Land as a whole. In several municipalities, specific offices have been created to facilitate supra-regional cooperation. In other municipalities this type of cooperation is accomplished by Regional Conferences on Cultural Affairs.

The various levels of government have rather different approaches to the systematic integration of culture into other policy areas and to strategic planning. However, dwindling resources at all governmental levels have encouraged greater inter-ministerial coordination in terms of the definition of goals and the use of resources.

¹⁴ Monitoring of Selected Economic Key Data on Culture and Creative Industries 2011, Federal Ministry of Economics and Technology

4. TOURISM SECTOR IN GERMANY

Tourism is one of Germany's booming and lucrative economic sectors that promotes Germany as a positive and friendly destination. Tourist services increase the appeal and popularity of cities and regions and thereby strengthen Germany's position as a place for business and investment overall. Tourism is a multifaceted industry, encompassing tour operators and travel agencies, hotels and restaurants in urban and rural areas, trade fairs, convention and event centres, museums, theatres and other cultural facilities, camping sites, car, boat and bike rental, sporting facilities, preventive health and rehabilitation clinics, nature reserves and leisure parks, bus, rail and air transport companies, and some of the retail sector all of which offer attractive services to both private holiday makers and the business traveller.

Tourism plays a key role in the German Economy. By the end of the 2012 international visitors had made a total of 68.8 million overnight stays in Germany and Germany was the second most popular destination for European travellers. Accessible tourism has also been recognized in Germany as a key driver to growth in the German economy and in one of the objectives of the German National Tourist Board for 2013 was to ensure that tourism in Germany is accessible to everyone.

Cultural tourism supply in Germany can be divided into three main elements:

- cultural attractions (e.g. museums, historic buildings)
- cultural events (e.g. the performing arts, festivals)
- cultural tourism packages supplied by commercial tour operators and educational organizations

On the supply side cultural tourism can also be classified as study trips, educational trips, opera and musical trips, theatre trips, experience-oriented cultural trips and thematic cultural trips. City trips are a special case of cultural tourism as they are often involve visits to several cultural attractions and/or events.

The range of city trips on offer is more and more determined by major cultural events which are another reason to visit the city, in addition to its permanent attractions such as a historical town centre or buildings. The options for cultural tourism available in cities are manifold, ranging from museums and art exhibitions to concerts and festivals and to cultural history and culinary weekends. The major increases in attendance at theatre performances is also very interesting from the tourism perspective. In Hamburg, for example, 700,000 people go to see the Phantom of the Opera every year, and many of them come from outside the city. The musicals have become an important element in the tourist attractions of this city. They may either be the primary purpose of a trip or tourists may consider them as an additional element of their holidays.

These cultural attractions are often specially marketed. Advertisements and stands at fairs as well as promotional brochures and posters published by the city's tourist information office are most commonly used to promote the attractions to a broad audience. Depending on the size of the town and the available advertising budget the town may also be promoted abroad. Another possibility is to cooperate with travel agents or representatives and local hotels.

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5. CCI AND TOURISM SECTOR COOPERATION IN GERMANY

There is no specific national policy or instruments linking CCIs to tourism. However, culture (mainly events) and creative industries (such as music) or institutions (museums) appear de facto as factors for fostering the development of a thriving cultural tourism with important economic and social impact.

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

In the last 20 years, foreign cultural policy has repeatedly suffered from cuts in funding. This trend came to an end in 2005, when the higher place of cultural foreign policy on political agendas was underlined by improvements in the federal budget. Against the former trends, funding for foreign cultural policies increased during the following years, amounting to 373.8 million EUR in 2009, approximately one third of the cultural expenditure of the federal government. In 2012 the funding for foreign cultural policies was and 408.6 million EUR. The rise in expenditure from 2007 to 2012 is primarily linked to the increased grant for the Goethe-Institutes, currently 159 institutes in 98 countries.¹⁵

The most important areas of foreign cultural relations and educational policy (AKBP) as third pillar of foreign policy besides the political and economic relationships are cross-border co-operation in education and science, international cultural dialogue, promotion of the German language abroad, and exchanges in the fields of art, music and literature. In 2011, the Foreign Office presented a new concept of AKBP: AKBP in times of globalization – gaining partners, conveying values, representing interests.

For the period 2013/2014 the following main focuses are listed in the 18th report of the Federal Government concerning AKBP: culture and sports, education, co-operation and dialogue, Germany's image abroad as well as regional focusses (for example Ukraine). In 2013, the expenditures of AKBP amounted to 1 571 million EUR, in 2014 to 1 591 million EUR, around half of these amounts accounted for the AKBP household (budget) of the Foreign Office.

In 2014, the Foreign Office initiated a review-process "foreign policy thought ahead" – a "self-understanding of perspectives of German foreign policy" concerning the areas of foreign policy.

International co-operation¹⁶ in the cultural sphere is taking on increasing significance. A particularly important example in this context is the intensified efforts to cultivate a dialogue between cultures. In 2005, the German Commission for UNESCO was particularly active in the process of developing and passing a convention on protecting and promoting the diversity of cultural expressions as an international legal instrument.

In February 2007, the German parliament passed the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions and, simultaneously, the UNESCO Convention concerning the Protection of the World Cultural and Natural Heritage.

Germany acceded to the UNESCO Convention on Intangible Cultural Heritage in 2013, with the instrument of acceptance deposited with UNESCO in Paris on 10 April 2013 and the Convention entering into force for Germany in July 2013.

a. Key elements of Germany's presence/participation on the International cultural stage

Certified Cultural Routes of the Council of Europe crossing Germany¹⁷:

¹⁵ Federal Republic of Germany Ministry of Culture

¹⁶ German National Commission for UNESCO

¹⁷ <http://culture-routes.net/cultural-routes/list>

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- The Santiago De Compostela Pilgrim Routes
- The Hansa
- The Heinrich Schickhardt Route
- The Viking Routes
- European Mozart Ways
- The European Route of Jewish Heritage
- The Saint Martin of Tours Route
- The Cluniac Sites in Europe
- The Via Regia
- Transromanica - The Romanesque Routes of European Heritage
- The Iter Vitis Route
- The European Route of Cistercian abbeys
- The European Cemeteries Route
- European Route of Historical Thermal Towns
- The European Route of Ceramics
- The European Route of Megalithic Culture
- The Huguenot and Waldensian trail
- The Réseau Art Nouveau Network
- Via Habsbourg
- The European Routes of Emperor Charles V
- Destination Napoleon

World Heritage Sites: 40 (37 cultural and 3 natural)

Cultural:

- Aachen Cathedral (1978)
- Speyer Cathedral (1981)
- Würzburg Residence with the Court Gardens and Residence Square (1981)
- Pilgrimage Church of Wies (1983)
- Castles of Augustusburg and Falkenlust at Brühl (1984)
- St. Mary's Cathedral and St. Michael's Church at Hildesheim (1985)
- Roman Monuments, Cathedral and Church of Our Lady in Trier (1986)
- Hanseatic City of Lübeck (1987)
- Frontiers of the Roman Empire (transboundary with the United Kingdom) (1987, extension in 2005 and 2008)
- Palaces and Parks of Potsdam and Berlin (1990, extension in 1992 and 1999)
- Abbey and Altenmünster of Lorsch (1991)
- Mines of Rammelsberg and the Historic Town of Goslar and Upper Harz Water Management System (1992)
- Town of Bamberg (1993)
- Maulbronn Monastery Complex (1993)
- Collegiate Church, Castle and Old Town of Quedlinburg (1994)
- Völklingen Ironworks (1994)
- Bauhaus and its sites in Weimar and Dessau (1996)
- Cologne Cathedral (1996)
- Luther Memorials in Eisleben and Wittenberg (1996)

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- Classical Weimar (1998)
- Museumsinsel (Museum Island) (1999)
- Wartburg Castle (1999)
- The Garden Kingdom of Dessau-Wörlitz (2000)
- Monastic Island of Reichenau in Essen (2000)
- Zollverein Coal Mine Industrial Complex (2001)
- Upper Middle Rhine Valley (2002)
- Historic Centres of Stralsund and Wismar (2002)
- The Town Hall and Roland on the Marketplace of Bremen (2004)
- Muskauer Park / Park Muzakowski (transboundary with Poland) (2004)
- Old town of Regensburg with Stadtamhof (2006)
- Berlin Modernism Housing Estates (2008)
- Prehistoric Pile Dwellings around the Alps (2011)
- Fagus Factory in Alfeld (2011)
- Margravia Opera House Bayreuth (2012)
- Bergpark Wilhelmshöhe (2013)
- Carolingian Westwork and Civitas Corvey (2014)
- Speicherstadt and Kontorhaus District with Chilehaus (2015)

Natural:

- Messel Pit Fossil Site (1995)
- Primeval Beech Forests of the Carpathians and the Ancient Beech Forests of Germany (jointly with Slovakia and Ukraine) (2007, extension in 2011)
- The Wadden Sea (transboundary with the Netherlands) (2009)

Tentative List: 18 properties

- Francke Foundation Buildings (1999)
- The Naumburg Cathedral and the landscape of the rivers Saale and Unstrut an important dominion in the High Middle Ages (1999)
- L'oeuvre architecturale et urbaine de Le Corbusier – deux maisons du Weissenhof-Siedlung à Stuttgart (2007)
- VIKING MONUMENTS AND SITES / Danevirke and Hedeby (2011)
- Mining Cultural Landscape Erzgebirge/Krušnohoří (2012)
- Great Spas of Europe (2014)
- The Jewish Cemetery of Altona Königstraße. Sephardic Sepulchral Culture of the 17th and 18th century between Europe and the Caribbean (2015)
- Alpine and pre-alpine meadow and marsh landscapes (historic anthropogenic landscapes in the area of “Werdenfelser Land”, “Ammergau”, “Staffelseegebiet” and “Murnauer Moos”, district Garmisch-Partenkirchen) (2015)
- ShUM cities of Speyer, Worms and Mainz (2015)
- Residence Ensemble Schwerin – Cultural Landscape of Romantic Historicism (2015)
- The Bauhaus and associated sites in Weimar, Dessau and Bernau (2015)
- Darmstadt Artists' Colony Mathildenhöhe (2015)
- Old Synagogue and Mikveh in Erfurt – Testimonies of everyday life, religion and town history between change and continuity (2015)

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- Dreams in Stone – the palaces of King Ludwig II of Bavaria: Neuschwanstein, Linderhof and Herrenchiemsee (2015)
- Hydraulic Engineering and Hydropower, Drinking Water and Decorative Fountains in Augsburg (2015)
- Caves with the oldest Ice Age art (2015)
- Luther memorials in Saxony-Anhalt, Saxony, Bavaria and Thuringia (2015)
- Frontiers of the Roman Empire (2015)

Intangible Heritage Lists: no elements

Memory of the World Register: 20 inscriptions

- Early cylinder recordings of the world's musical traditions (1893-1952) in the Berlin Phonogramm-Archiv (1999)
- Ludwig van Beethoven - Symphony n°9, d-minor, op.125 (2001)
- The literary estate of Goethe in the Goethe and Schiller Archives (2001)
- 42-line Gutenberg Bible, printed on vellum, and its contemporary documentary background (2001)
- "METROPOLIS" - Sicherungsstück Nr. 1: Negative of the restored and reconstructed version (Film) (2001)
- Illuminated manuscripts from the Ottonian period produced in the monastery of Reichenau (Lake Constance) (2003)
- Kinder- und Hausmärchen (Children's and Household Tales) (2005)
- Universalis cosmographia secundum Ptholomaie traditionem et Americi Vespuccii aliorumque Lustrationes (2005)
- The Bibliotheca Corviniana Collection (2005)
- "Collection of Manuscript Papers of Gottfried Wilhelm Leibniz", famous German philosopher, scientist, mathematician, diplomat, librarian and legislator (2007)
- "Song of the Nibelungs", a heroic poem from mediaeval Europe (2009)
- Benz Patent of 1886 (2011)
- Construction and Fall of the Berlin Wall and the Two-Plus-Four-Treaty of 1990 (2011)
- Lorsch Pharmacopoeia (The Bamberg State Library, Msc.Med.1) (2013)
- Manifest der Kommunistischen Partei, draft manuscript page and Das Kapital. Erster Band, Karl Marx's personal annotated copy (2013)
- Nebra Sky Disc (2013)
- The "Golden Bull" – All seven originals and the "King Wenceslaus' luxury manuscript copy" of the Österreichische Nationalbibliothek (2013)
- Documents representing the beginning and the early development of the Reformation initiated by Martin Luther (2015)
- Autograph of h-Moll-Messe (Mass in B minor) by Johann Sebastian Bach (2015)
- The Golden Letter of the Burmese King Alaungphaya to King George II of Great Britain (2015), jointly with United Kingdom and Myanmar

Creative Cities Network: 4

- Berlin, UNESCO City of Design (since 2005)

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- Heidelberg, UNESCO City of Literature (since December 2014)
- Mannheim, UNESCO City of Music (since December 2014)
- Hannover, UNESCO City of Music (since December 2014)

Legal instruments: 29 ratified and 11 non-ratified

- Convention on the Protection of the Underwater Cultural Heritage: non-ratified
- Convention on the Protection and Promotion of the Diversity of Cultural Expressions: ratified (12 March 2007)
- International Convention against Doping in Sport: ratified (31 May 2007)
- Convention for the Safeguarding of the Intangible Cultural Heritage (10 April 2013): acceptance

7. COUNTRY 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 are further developed in the cross-country report. The most relevant has been chosen for this exercise.

7.1. *The Schleswig-Holstein Music Festival*¹⁸

At the beginning there was, as so often, just a vague idea of a few people involved with the arts, government and commerce. The idea was to present music performed by world-class artistes to a broad audience, in their home town. Thus, a consumer-oriented approach replaced the traditional attitude of the culture industry.

“No longer does the customer have to go to the music, the music comes to the customer”. The informal nature and almost homely atmosphere of the concerts appealed to new audiences. The festival is for the people. A greater identification of the people with their federal state as a result of the festival is a beneficial side effect of the performances and a promotional tool for the whole region whose value should not be underestimated.

The festival improved the image of Schleswig-Holstein, a popular holiday destination. Enriching the range of cultural events with "top quality music in the north" meant that another group of potential tourists was addressed, in addition to nature and beach lovers.

The Schleswig-Holstein Music Festival is a non-profit organization which takes the form of a registered charitable association. There is a manager who is responsible for the organizational aspects and marketing

The programme consists of several 'product lines'. Besides major events with well-known orchestras and conductors, the festival also features talented young artistes. Solo performances, chamber music and master classes enhance the programme. Unusual venues such as barns and castles lend a special atmosphere to the concerts which is reinforced by the northern landscape. Special annual themes such as "Music of the Baltic countries" or "Jewish Music" are further attractions. The consistent application of a mature marketing mix was one of the keys to the success of the Schleswig-Holstein Music Festival. A clear corporate identity consisting of a combination of music and the countryside (lakes, open land, the sea) means that the festival is multifaceted. Individual performances and the festival itself are promoted through advertisements, brochures, posters, etc.

In addition to the advertising activities the professional public relations are also a key to the success of the festival. Regional radio stations provide daily information about the concerts.

7.2. *The Schleswig-Holstein Rural Open-Air Museum*¹⁹

This is the biggest open-air museum south of Kiel in northern Germany. On the 140-acre site with meadows, gardens, fields and ponds you can see seventy historical buildings, farmyards and mills from

¹⁸ Municipality of Kiel <http://www.kiel.de/kultur/index.php>

¹⁹ Guide Michelin and information gathered on situ <http://voyages.michelin.fr/europe/allemande/schleswig-holstein/molsee/musee-de-plein-air-du-schleswig-holstein>

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Schleswig-Holstein, complete with furniture, household equipment and tools. There is also a historical funfair with a roundabout and a swingboat. Household animals and pets that the children are permitted to touch are an added attraction. Craftspeople demonstrate their trades and sell their products. If you feel in need of refreshment you can stop off at the restaurant and try the products of the museum's own bakery, dairy and smokehouse.

7.3. *A success story: UNESCO-World Heritage in Germany*²⁰

The German UNESCO World Heritage Sites Association is a collaboration between World Heritage sites in Germany and the tourism marketing organisations responsible for promoting them.

Germany's UNESCO World Heritage sites first joined forces to form a tourism alliance in 1989. The association born out of this was founded in 2001 in Quedlinburg with the aim of intensifying tourism marketing efforts. Quedlinburg is also home to the association headquarters, in historical Palais Salfeldt.

Members alongside the tourism marketing organizations include the German Commission for UNESCO, the German National Tourist Board, the German Foundation for Monument Protection and an array of sponsors.

The German UNESCO World Heritage Sites Association aims to increase the popularity of German World Heritage sites and highlight their individual appeal, to promote Germany's outstanding to increase the popularity of UNESCO World Heritage sites in Germany

- to promote low-impact and specialized tourism to World Heritage sites on a sustainable scale
- to coordinate historic preservation and tourism
- to continuously support the preservation of World Heritage sites through funds generated by tourism
- to advise World Heritage cultural heritage on a collaborative basis and to establish itself as a beacon for travel in and to Germany. Particular emphasis is given to the promotion of low-impact and specialized tourism to World Heritage sites on a sustainable scale.

Partners:

- tourism marketing organisations for towns, cities, regions and federal states with World Heritage sites
- many of the organisations in charge of the World Heritage sites
- the German Commission for UNESCO
- the German National Tourist Board
- the German Foundation for Monument Protection
- various sponsors.

7.4. *Kiel, sailing city*²¹

Situated on Germany's Baltic coast, Kiel is the country's sailing capital. Every year it hosts Kieler Woche (Kiel Week), one of the largest sailing festivals in the world. It also has previous experience with multihulls – the Extreme Sailing Series was held there for three years over 2008-2010, while in 2012 it was the start port for the European Tour of the MOD70 trimarans. However the GC32 Sailing Cup Kiel will

²⁰ German National Commission for UNESCO

²¹ Information gathered in situ and Municipality of Kiel

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be the first occasion Kiel has hosted a fleet of foiling catamarans, similar, but smaller, to those used in the America's Cup.

Kiel is marketing itself as a Holiday destination Kiel Fjord - city, beach, ships and most of all as a Sailing City, linking directly sports to its tourism industry. Kiel is one of Germany's most important cruise ports. Year by year around 400.000 passengers visit the Kiel Fjord during 120 calls. Season kickoff 2016 was on 25th April with AIDAAluna on its first of 18 calls. Large campaigns are continuously fed with news and attractions on internet and social media.

Gigantic ferries to Scandinavia, cruise liners from all over the world, shopping malls, Baltic beaches and the cultural scene make the city centre of Kiel, the capital of Schleswig-Holstein, through its unique location at Kiel Fjord on the waterfront like no other Baltic metropolis a destination for international tourists. Museums, shopping centers and food businesses are included in the campaigns.

7.5. *The "Viking museum Hedeby"- Archaeology visualised*

A settlement section of seven houses is reconstructed as part of the project "Viking museum Hedeby". The aim of the project is to display the environment of this early medieval centre within the site itself. The supplementation of the project by the reconstruction of a jetty constitutes an important step for the mediation of the way of life within the proto-town of Hedeby. Its economic significance is intrinsically tied to its importance as a major maritime trading place. With the jetty now visitors can recognize Hedeby in its maritime dimension.

Situated in the borderland between the Carolingian-Ottonian continent and the Scandinavian world, Hedeby quickly developed into the most important port of trade of early medieval northern Europe. Trade goods from all over the then known world conglomerated to the site. Roads in those times were bad and the cargo capacities of carriages modest. Ships therefore were the decisive means for transportation in trade. The jetty forms an important component to present the maritime dimension of the way of life within the port of trade at that time. It is accessible for visitors and is supplemented by a replica of a Viking-age ship in the summertime. The Schleswig-Holstein State Museum's Trust and the Viking Museum Hedeby were in charge of the reconstruction project. It was partly funded by the European Regional Development Fund. Archaeology visualised – The Viking houses and a reconstructed jetty in Hedeby A settlement section of seven Viking Houses of Haithabu within the semicircular rampart was reconstructed in the project in Hedeby.

The archaeological original for the reconstruction of the jetty comes from the harbour excavation of Hedeby. During the harbour excavation in a cofferdam, a royal personnel carrier from the end of the 10th century was salvaged. Rows of post stumps that were placed regularly were recognized as substructures of large harbour facilities. The facilities enabled large cargo carriers the berth within the harbour. The harbour excavation is now scientifically worked up by using a GIS-system, in which all the excavation documentation has been transferred. Artefacts as scales and weights, coins, brass bars, millstones, weapons, glass-, rock crystal- and carnelian beads, antlers and amber from the harbour basin testify that trading transactions were conducted directly at the new entered port and berthed ships at the front of the jetties. The reconstructed jetty with visitors has view towards the Haddbyer Noor. The jetty has been reconstructed in a scale of 1:1, with a length of more than 40 meters and a breadth of nearly 10 meters. Copyright the Schleswig-Holstein State Museum's Trust. 44 The first underwater archaeological park in the Baltic Sea region was opened as an underwater part of a temporary exhibition called "Ships Lost at Sea" in 2000.

The park is at the wreck site of the Kronprins Gustav Adolf. It is managed by the National Board of Antiquities, Finland. Underwater cultural heritage has traditionally been presented to the general public

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in museums, or even by raising whole shipwrecks. Another way is to establish a so-called underwater park where divers can follow an underwater trail and learn more about the site. Along the trail there are information signs explaining the artifacts and structures to be found on the site. Boats arriving to the park are fastened to a mooring buoy near the wreck. In underwater parks, attempts are made to preserve the site as much as possible in its original condition and to favor non-destructive techniques in the investigations preceding the foundation of the park. The aim of the parks is to make the sites accessible as well as to educate the general public, and to promote the preservation and management of underwater cultural heritage.

7.6. *Garden Dreams*²²

Garden tourism offers vast unused potential. The delight to experience gardens as historic as well as modern elements of culture, but also as a factor of local characteristics can be noticed everywhere. Walking picturesque paths, discovering farm houses, mansions and castles, having a rest at enchanted places, savouring the scent of flowers, colour and form - gardens fascinate and interest us. German parks and gardens want to develop a higher position in the European context. European regions are to be livened up by parks and gardens in their function as a cultural and economic factor working in multilateral projects and exchanging experiences. More than 20 regional networks of parks and gardens already exist across Germany. Through the federal association „Gartennetz Deutschland e.V.“ regional garden initiatives collaborate more intensively among each other as well as with intermediary branches.

The project was launched in 2007. Annual conferences and workshops since 2003 have already led to exchange of information on programs of care and preservation, training as well as garden tourist marketing. A journey through Saxony-Anhalt's garden history offers insight to monastery gardens, Baroque parks and landscape gardens up to contemporary art and land art projects. Forty of the most beautiful and important historic parks and gardens are linked in the network “Garden Dreams-Gartenträume - Historic Parks in Saxony-Anhalt”. It was founded in 2003 as a non-profit-making organization. Together with its partners it works to ensure the implementation, development and sustainability of the Garden Dreams project. This project is devoted to conservation and tourism alike. Its aim is to rediscover the richness in garden heritage. Some of the gardens had almost been forgotten by the people and are now restored and brought back to the wider public. The network aims at contributing to the conservation and preservation of the garden heritage, developing and implementing strategies for sensible use of the historic parks and gardens. The Garden Dreams project brings the owners of parks and gardens together with policy makers, administrators, teachers, academics, historic garden experts, conservationists and representatives of trade, industry and culture to jointly work out and implement the measures needed to sustain the overall concept behind the project. Gardens have always been places where art and nature met. They come to live through the interaction with their visitors.

Music and theatre, dancing and songs, markets and culinary treats enable and enhance the garden experience and enjoy their atmosphere. Therefore garden initiatives will present their grounds in their cultural special quality in connection with many other artistic and culinary events. In addition, numerous activities are undertaken to ensure the economic sustainability and long-term impact of the project. They include the staging of cultural events appropriate to historic monuments, the opening of Garden Dreams shops with a select range of garden-related items and regional products, the training of park and garden guides, the launching of a wide variety of youth projects, the promotion of voluntary work and the

²² The text is based on the presentation “Garden Dreams in Saxony Anhalt and the Garden-network Germany” by Christa Ringkamp at the III Baltic Sea region Cultural Heritage Forum 2007 in Vilnius.

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organization of high-quality tours. Parks and gardens have to be more attractive, visited and booked more often and maintained for future generations.

To establish garden tourism in Germany garden initiatives, tourist professionals and marketing experts have to be mobilised following the aim to develop and market garden routes, arrange reservations and promote various information media tailored to suit the market's needs. Incorporating garden routes into tourism, annual federal event topics, quality management for parks and gardens, training and exchanging intense border-crossing experiences shall open up Germany with its garden cultural diversity.

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 is more concretely illustrated in the cross-country report and respective recommendations.

8.2. Country conclusions – Germany

1. In Germany there is no binding definition of culture that could serve as the basis for cultural programmes and measures whilst its overall cultural policy is based on a federal model and governed by the principles of decentralization, subsidiary and plurality.

An important objective influencing the development of cultural policy throughout Germany, is to find a balance between public-sector responsibility for ensuring the existence and funding of cultural institutions and programmes without government interference in cultural activities. During the recent decades and namely after the country's unification, there have been discussions concerning the privatization of public services and institutions which has intensified efforts to promote more efficient arts management. As a result, there is a greater receptiveness to public-private partnership models and a willingness to privatize some cultural institutions.

2. The various levels of government have rather different approaches to the systematic integration of culture into other policy areas and to strategic planning. However, dwindling resources at all governmental levels have encouraged greater inter-ministerial coordination in terms of the definition of goals and the use of resources.
3. Cultural and creative industries are a separate and autonomous pillar of cultural life in the Federal Republic of Germany. Generally, the cultural field is divided into three sectors:
 - a. private cultural enterprises
 - b. state or municipal publicly financed institutions or activities like theatre, cultural heritage, monuments, libraries, museums
 - c. not-for-profit, intermediary organizations, foundations, associations etc.

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The cultural and creative industry sector in Germany consists of 11 submarkets: music industry, book market, art market, film industry, broadcasting industry, performing arts market, architecture market, design industry, press market, advertising market and software and games industry.

4. Cultural tourism in Germany can also be classified as study trips, educational trips, opera and musical trips, theatre trips, experience-oriented cultural trips and thematic cultural trips. City trips are a special case of cultural tourism as they often involve visits to several cultural attractions and/or events.

CCIs are rather indirectly linked to tourism, namely through cultural events which are considered major promotional tools and therefore important elements in the economic policies of cities and tourist regions – this constitutes a tacit link between CCIs and tourism although there is no specific national policy or instruments linking these. In most cases, linkages are done on an *ad hoc* basis, depending on the specific context (i.e. Kiel Sailing City, investing its tourism image on its character as an important centre for sailing – in this we consider that sports are part of culture, of not of CCIs).

5. International co-operation in the cultural sphere is taking on increasing significance in Germany. A particularly important example in this context is the intensified efforts to cultivate intercultural dialogue, which also corresponds to the overall German approach to culture, inclusive of other cultural features and specificities through the integration of migrant and refugee populations. In terms of regional and international cooperation Germany is very keen to further develop links and shared actions with its neighbouring countries as well as at the international level, although this intention is expressed to a rather uneven degree between regions.

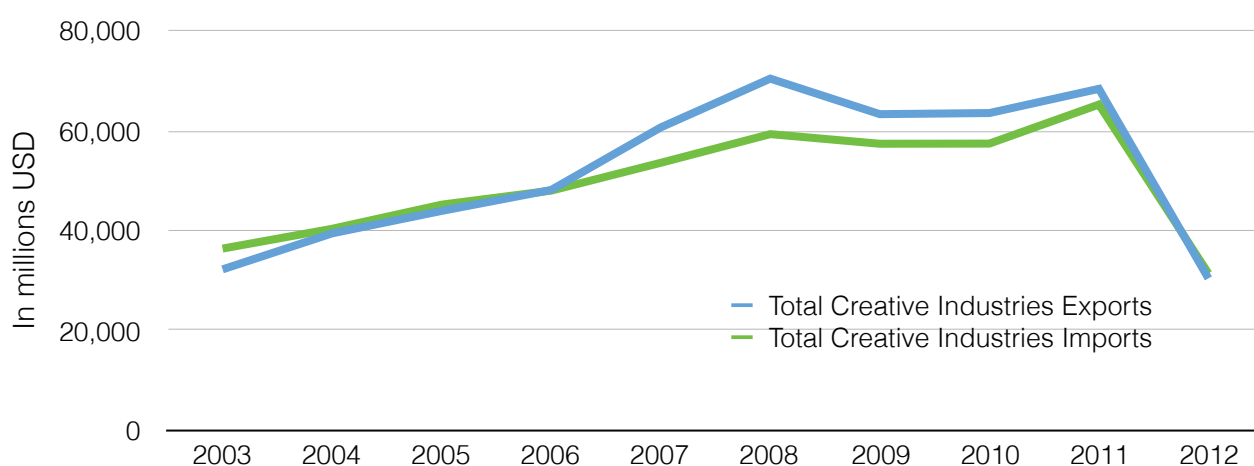
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Country Report – Germany

Appendix A. Key Facts and Figures (UNCTAD)²³

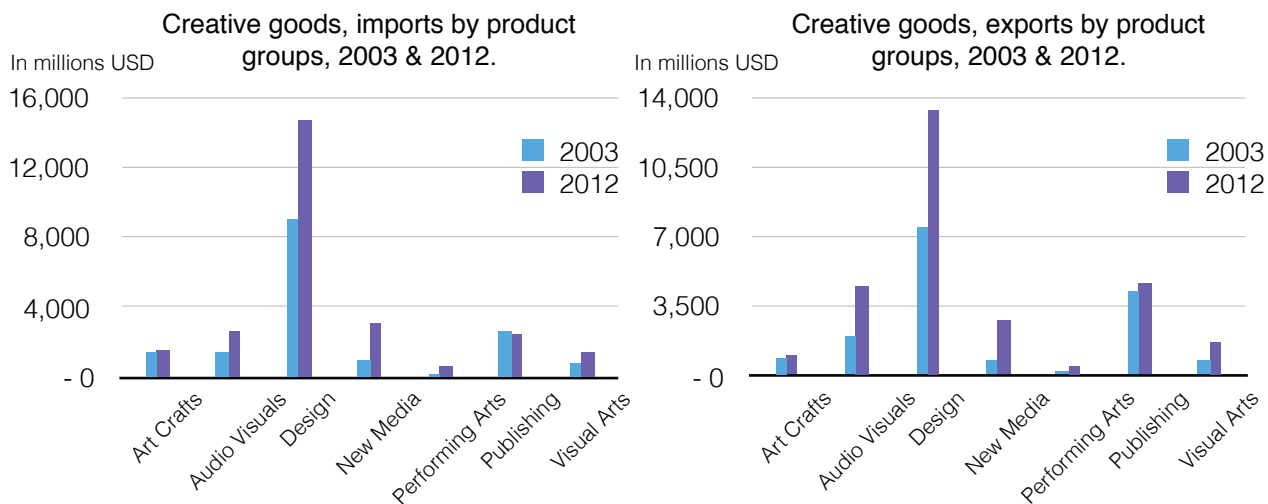
| COUNTRY PROFILE - German | | | | | | |
|--|--------------------------|-----------|----------|--------------------------|-----------|----------|
| Creative Industries Trade Performance, 2003 and 2012 | | | | | | |
| German | 2003 | | | 2012 | | |
| | Value (in Million US\$) | | | Value (in Million US\$) | | |
| | Exports | Imports | Balance | Exports | Imports | Balance |
| All Creative Industries | 32,201.98 | 36,370.24 | 4,168.26 | 30,399.90 | 31,384.58 | 984.69 |
| All Creative Goods | 16,518.61 | 16,201.72 | 316.90 | 28,718.62 | 26,460.67 | 2,257.94 |
| All Creatives Services | 15,683.37 | 20,168.53 | 4,485.16 | 1,681.28 | 4,923.91 | 3,242.63 |

German: Creative Industry Trade Performance, 2003-2012.



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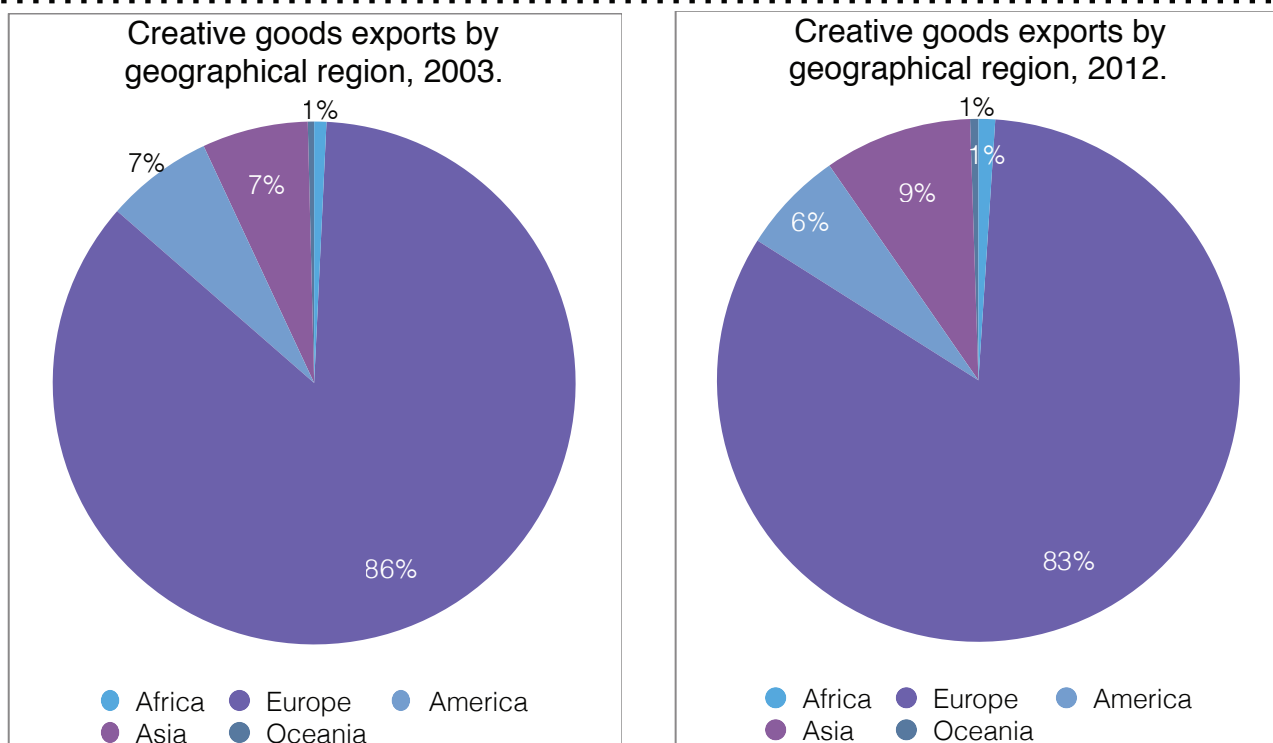
Country Report – Germany



Germany's creative industries exports reached \$30,399 million in 2012. Imports dropped between 2003 and 2012, reducing the trade balance deficit in the creative industries sector to \$984.7 million. Design exports (interior design, fashion, toys, jewellery) accounted for \$13,405 million in 2012, followed by publishing (books and newspapers) which stood at \$4,686 million, although the growth rates for the publishing sector have remained nearly flat.

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| 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 | Switzerland | 1,943.22 | 575.25 | 1367.97 | France | 3,571.65 | 1,193.14 | 2378.51 |
| 2 | Austria | 1,929.87 | 730.39 | 1199.47 | Austria | 3,497.52 | 1,199.38 | 2298.14 |
| 3 | United Kingdom | 1,860.55 | 482.47 | 1378.08 | Switzerland | 3,364.59 | 1,186.07 | 2178.53 |
| 4 | France | 1,810.33 | 639.40 | 1170.93 | Netherlands | 1,923.92 | 1,203.30 | 720.62 |
| 5 | Netherlands | 1,432.80 | 1,114.53 | 318.27 | United Kingdom | 1,801.76 | 868.58 | 933.18 |
| 6 | United States | 915.46 | 554.68 | 360.79 | Italy | 1,676.90 | 1,344.39 | 332.51 |
| 7 | Italy | 811.64 | 1,027.16 | 215.52 | United States | 1,331.36 | 707.68 | 623.68 |
| 8 | Czech Republic | 589.00 | 880.48 | 291.47 | Belgium | 1,140.30 | 504.18 | 636.12 |
| 9 | Spain | 573.76 | 169.65 | 404.11 | Russian Federation | 950.89 | 112.76 | 838.14 |
| 10 | Belgium | 560.40 | 446.70 | 113.69 | Poland | 866.75 | 1,330.57 | 463.82 |

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

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Appendix B. Key documents and sources

Resource persons:

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Dr Horst Korn

Mr Rudolf Specht

Mr Bernd Fesel

Mr Michael Söndermann

Dr Walter Hirche

Sources:

Overview of the Reports Prepared by German Federal States

1. North Rhine-Westphalia

1st – 4th culture industries report, 1992 to 2002; 5th report expected in spring 2007

Contact: Ministerium für Wirtschaft, Mittelstand und Energie des Landes Nordrhein-Westfalen

Haroldstr. 4

D-40213 Düsseldorf · Germany

2. Mecklenburg-Vorpommern

1st culture industries report, 1997

Contact: Wirtschaftsministerium Mecklenburg-Vorpommern

Johannes-Stelling-Str. 14

D-19053 Schwerin · Germany

3. Bremen

GLP Kultur-, Medien- und Freizeitwirtschaft of 1999. New report under preparation, expected in 2007

Contact: Senator für Wirtschaft und Kultur in Bremen

Herdentorsteinweg 7

D-28195 Bremen · Germany

4. Bavaria

Report on the Bavarian culture industries of 2001

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Contact: Bayerisches Staatsministerium für Wissenschaft, Forschung und Kunst

Salvatorstr. 2

D-80333 München · Germany

5. Saxony-Anhalt

1st and 2nd culture industries report 2001 to 2007

Contact: Kultusministerium des Landes Sachsen-Anhalt

Wirtschaftsministerium des Landes Sachsen-Anhalt

D-39114 Magdeburg · Germany

6. Lower Saxony

Culture industries report of 2002. The second culture industries report is expected in autumn 2007.

Contact: Nds. Ministerium für Wirtschaft, Arbeit und Verkehr

Friedrichswall 1

D-30159 Hannover · Germany

7. Schleswig-Holstein

Development and status of the culture industries in Schleswig-Holstein

Report of the government of the Land of Schleswig-Holstein, Drucksache 15/3482

Contact: Landesregierung Schleswig-Holstein

Düsternbrooker Weg 70

D-24105 Kiel · Germany

8. Hessen

1st and 2nd culture industries report of 2003 and 2005

Contact: Hessisches Ministerium für Wirtschaft, Verkehr und Landesentwicklung

Postfach 3129

D-65021 Wiesbaden · Germany

9. Berlin

1st culture industries report Berlin of 2005

Contact: Senat für Wirtschaft, Arbeit und Frauen

Martin-Luther-Straße 105

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Country Report – Germany

D-10825 Berlin · Germany

10. Hamburg

Culture industries report Hamburg 2006

Contact: Freie und Hansestadt Hamburg, Kulturbehörde

Hohe Bleichen 22

D-20354 Hamburg · Germany

11. Baden-Württemberg

IT and media industries, creative industries 2007

Contact: Wirtschaftsministerium Baden-Württemberg, Referat Dienstleistungen

Theodor-Heuss-Straße 4

D-70174 Stuttgart · Germany

12. Brandenburg

Culture industries report 2007 (under preparation, summer 2007)

Contact: Wirtschaftsministerium und Kulturministerium, Referat 32

Heinrich-Mann-Allee 107

D-14473 Potsdam · Germany

13. Aachen

First culture industries report 2005

Contact: GründerZentrum Kulturwirtschaft

Sandkaulstraße 1

D-52062 Aachen · Germany

14. Cologne

Culture industries report 2007 (under preparation)

Contact: RheinEnergieStiftung Kultur

Maarweg 161

D-50825 Köln · Germany

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Clifton, N., Cooke, P., & Hansen, H. K. (2013). Towards a reconciliation of the ‘context-less’ with the ‘space-less’? The creative class across varieties of capitalism: new evidence from Sweden and the UK. *Regional Studies*, 47, 201–215.

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EC (2010). *GREEN PAPER: Unlocking the potential of cultural and creative industries*. Brussels: European Commission.

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Galloway, S., & Dunlop, S. (2007). A critique of definitions of the cultural and creative industries in public policy. *International Journal of Cultural Policy*, 13, 17–31.

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United Nations [UN] (2013). *Creative economy report 2013. Special edition. Widening local development pathways*. Geneva and New York: UN.

Wang, J. (2004). The global reach of a new discourse how far can 'creative industries' travel? *International Journal of Cultural Studies*, 7, 9–19.

Specific:

Cultural policy making bodies

Federal Commissioner for Cultural and Media Affairs (Bundesbeauftragter für Kultur und Medien)

<http://www.kulturstaatsminister.de>

German Federal Office (Auswärtiges Amt)

<http://www.auswaertiges-amt.de>

Federal Ministry of Education and Research (Bundesministerium für Bildung und Forschung)

<http://www.bmbf.de>

Committee on Culture and Media at the Deutscher Bundestag (Ausschuss für Kultur und Medien im Deutschen Bundestag)

<http://www.bundestag.de/bundestag/ausschuesse17/a22/index.jsp>

Committee on Cultural Issues at the Deutscher Bundesrat (Ausschluss für Kulturfragen im Bundesrat)

http://www.bundesrat.de/nn_11452/DE/organe-mitglieder/ausschuesse/k/knode.html?_nnn=true

Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany (KMK)

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<http://www.kultusministerkonferenz.de>

German Association of Cities, German Association of Towns and Municipalities, Association of German Counties

<http://www.kommunale-spitzenverbaende.de>

Goethe-Institut Inter Nationes

<http://www.goethe.de>

Professional associations Arbeitsgemeinschaft Deutscher Kunstvereine

<http://www.kunstvereine.de>

Bundesverband Bildender Künstlerinnen und Künstler

<http://www.bbk-bundesverband.de>

Bundesverband der Jugendkunstschulen und Kulturpädagogischen Einrichtungen

<http://www.bjke.de>

Bundesvereinigung Kulturelle Jugendbildung e. V. [BKJ] (Federal Government of Youth Cultural Associations)

<http://www.bkj.de>

Bundesvereinigung Soziokultureller Zentren

<http://www.soziokultur.de>

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Deutscher Bühnenverein – Bundesverband deutscher Theater

<http://www.buehnenverein.de>

Deutscher Kulturrat (German Arts Council)

<http://www.kulturrat.de>

Deutscher Museumsbund

<http://www.museumsbund.de>

Deutscher Volkshochschulverband (German Adult Education Association)

<http://www.dvv-vhs.de>

Kulturpolitische Gesellschaft e. V.

<http://www.kupoge.de>

Verwertungsgesellschaft Bild-Kunst (Copyright Society)

<http://www.bildkunst.de>

Grant-giving bodies

Cultural Foundation of the federal states (Länder)

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<http://www.kulturstiftung.de>

Federal Cultural Foundation

<http://www.kulturstiftung-bund.de>

Mercator Foundation

<http://www.stiftung-mercator.de>

Stiftung Preußischer Kulturbesitz

<http://www.hv.spk-berlin.de>

Deutsche Nationalstiftung

<http://www.nationalstiftung.de>

Deutsche Stiftung Denkmalschutz

<http://www.denkmalschutz.de>

Stiftung Lesen

<http://www.stiftunglesen.de>

Bundesstiftung Baukultur

<http://www.bundesstiftung-baukultur.de>

Deutscher Übersetzerfonds

<http://www.uebersetzerfonds.de>

Stiftung Kunstfonds zur Förderung der zeitgenössischen bildenden Kunst

<http://www.kunstfonds.de>

Fonds Soziokultur

<http://www.fonds-soziokultur.de>

Deutscher Literaturfonds

<http://www.deutscher-literaturfonds.de/>

Fonds Darstellende Künste

<http://www.fonds-daku.de>

Cultural research, advices and statistics Creative Europe Desk

<http://www.ccp-deutschland.de>

Institut für Kulturpolitik der Kulturpolitische Gesellschaft e. V.

<http://www.kupoge.de>

Culture / arts portals

Kulturportal of the Federal Government and the federal states (Länder)

<http://www.kulturportal-deutschland.de>

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<http://www.kulturserver.de>

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Das KulturinformationsZentrum

<http://www.nmz.de/kiz/>

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<http://www.museumsbund.de>

WebMuseen

<http://www.museen.de>

Handbook of Cultural Awards

<http://www.kulturpreise.de>

Deutsches Musikinformationszentrum

<http://www.miz.org>

