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

Country Report – Estonia

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LIST OF ABBREVIATIONS

Acronym/abbreviation	Meaning
AHHAA	Science Center (in Tallinn)
CCI	Cultural and Creative Sector
CCS	Cultural and Creative Sector
ERDF	European Regional Development Fund
ESF	European Science Fund
ETFL	Estonian Travel and Tourism Association
EU	European Union
FWC	Framework Contract
GDP	Gross Domestic Product
HDI	Human Development Index
ICT	Information Communication Technology
IT	Information Technology
ND	Northern Dimension
NDPC	Northern Dimension Partnership on Culture
OECD	Organisation for Economic Co-operation and Development
PESA	Proovi Eristu Sihi Arenda
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 Leader. Given the number of countries, and their diversity, and given the very wide subject matter involving three very dynamic and currently fashionable areas - Cultural and Creative Industries, Tourism and Innovation - the time constraint was a very real challenge indeed. Amongst other things, it meant that while country visits of about five working days to all of the countries took place, it was physically only possible in most cases to visit one city, usually the capital. That said, every effort was made to secure a country overview which took into account at least some of the important developments taking place in the regions.

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

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

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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. This has been particularly evident in the case of the eleven Northern Dimension countries, even in the case of those countries which work very closely together, for example in the case of Lithuania, Latvia and Estonia. There can also be conceptually quite different national approaches. For example in one country cultural and creative industries may be seen as a distinct sector and be supported on that basis. In another country they may not even be seen as a sector but as part of something wider or cross-cutting such as one part of the creative economy, or as a part of national innovation, entrepreneurship or SME policies. The third issue flows from the other two. Because of an evolving and differing understanding in country terms of what the CCIs constitute, there is no common statistical base which allows clear comparisons or benchmarking, something which is urgently needed and is beginning to start being explored at European level.

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

Tourism categorisation is also constantly evolving with the existence of an increasing number of sub-sectors. Even cultural tourism, a sub-sector itself, can be broken down into possibly a dozen or more sub-sectors such as heritage tourism, arts tourism, creative tourism, urban cultural tourism, rural cultural tourism, indigenous cultural tourism, experiential and gastronomic tourism, 'dark' tourism, often with overlaps with other forms of tourism e.g. adventure tourism, health and well-being tourism and so on. 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.

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

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

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

- Software and digitalisation - this has had a revolutionary impact on many aspects of the tourism industry, not least in the role that OTAs play (e.g. TripAdvisor, booking.com, Expedia, Airbnb etc.)
- Design, especially graphic design but also right the way through all aspects of design including 'son et lumière' spectacles, light festivals and events etc.
- Music for place branding, ambience, open-air concerts etc.
- Advertising and broadcasting - the importance of these areas to the tourism industry are self-evident
- Film and cinema - promos, travelogues, film location tourism
- Theatre - use of actors as animators or for audio guides, staged events, historical pageants and re-enactments etc.
- Festivals - a major element in event tourism and place branding
- Crafts and antiques - as part of shopping and souvenirs
- Architecture - the tourism industry's use of built heritage and use/commissioning of significant buildings (including as hotels)
- Publishing - travel and guide books are still very popular
- Fashion - place image and branding, folk costumes etc.
- Gaming, augmented reality and VR - perhaps still at an early stage but already being used even by big, traditional tourism operators such as Thomas Cook
- Food and local natural products - food festivals, branding (‘appellation’) and gastrotourism in both urban and rural contexts

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Key points related to Estonia include:

- There is no state CCI policy per se, it is embedded within wider policies particularly related to entrepreneurship and the wider Estonian 'e-everything' agenda.
- A solid strategic knowledge, understanding and vision for CCIs and their development has been established in the past decade although there is more to do. Important strategic actions such as CCI mapping are ongoing e.g. the Ministry of Culture is starting an updated mapping of the CCI sector at the end of 2016.
- Awareness of the synergies between tourism and the CCIs is explicit in both tourism policy and cultural policy documents e.g. in the Ministry of Culture's cultural policy strategy to 2020 it states quite clearly in relation to the CCIs and heritage "The state supports the innovative connection of heritage culture with creative industries and entrepreneurship. The state values creative and developmental activities and entrepreneurship based on heritage and heritage technology."
- An extremely important and relevant development in January 2016 was the Creative Industries Support Measure Regulation which has provided a new basis for the allocation of grants for the development of creative industries support structures, joint projects and export enhancement. One measure of the success of the programme will be the degree to which the creative sector can produce added value in other economic sectors. The funding for the programme, coming out of the European Regional Development Fund, is 20 million Euros of which 16.1 million Euros will be allocated through open calls for proposals. The Ministry of Culture will use the remaining 3.9 million Euros for the purpose of raising awareness, knowledge and skills related to the creative industries and also for the implementation of major projects which involve the creative sector with other sectors. This represents a golden opportunity to explore new relationships between CCIs and the tourism sector.
- Of the three Baltic States, Estonia is currently performing significantly better in terms of ranking in the latest biennial World Economic Forum's Travel and Tourism Competitiveness Report (2015). In the country brand strategy rating it comes an impressively 7th (compared with Latvia rated 90th). It ranks 49th (Lithuania is 113th) in terms of effectiveness of marketing and branding to attract tourists. In the category of national prioritisation of the travel and tourism industry it comes 47th (compared with Latvia - 79th and Lithuania -122nd). As a percentage of GDP the travel and tourism industry in Estonia it is 3.4%, in Latvia -2.9% and in Lithuania - 1.8%. It should be said that these figures cover the year 2013. It is the personal speculation of the author of this report that in the next two Competitiveness Reports in 2017 and 2019 reflecting the years 2015 and 2017, the rankings of all three countries will see significant improvements in at least some of the categories.

2. BASIC COUNTRY INFORMATION

After centuries of Danish, Swedish, German and Russian rule, Estonia became independent in 1918. Its independence ended in 1940 when it was annexed by the Soviet Union. Independence was restored in 1991 with the collapse of the Soviet Union. It joined the EU in 2004 and the Euro zone in 2011.

Estonia is a small country of 45,228 sq km and has borders with Latvia and the Russian Federation. The 2016 estimate for the population is 1,258,545 which ranks it 159th in the world. About 69% off the population are ethnic Estonians with about 25% Russian. Estonian is the only official language. Estonia has a labour shortage and it is estimated that the population is shrinking by about 0.5%. Just under a quarter of the population live in Tallinn.

Estonia has a modern market-based economy and has become a leader in e-government and other digital revolution developments, including e-citizenship. It has one of the higher per capita income levels in central Europe and the Baltic region. There has been a continuing policy of pursuing a free market, pro-business economic agenda with sound fiscal policies that have balanced budgets and resulted in low public debt. It benefits from strong trade with Finland, Sweden and Germany. Unemployment was estimated at 6.2% in 2015.

3. CULTURAL AND CREATIVE SECTORS/ CCIS IN ESTONIA

As with the other two Baltic States, Latvia and Lithuania, serious interest in development of the CCI sector dates back just over a decade. In 2005, the first creative industries study was carried out in Estonia and like similar early studies in other countries began the process of establishing a definition of the CCI sector and what should and should not be included in it.

In Estonia, the Ministry of Culture defines what it terms the creative industries as an economic sector that is based on individual and collective creativity, skills and talent, and is capable of creating welfare and jobs through the generation and use of intellectual property. The Ministry tends to call the wider area of cultural and creative industries as simply 'creative industries'.

In Estonia the cultural and creative industries sectors are classified as follows:

- Architecture (which includes architecture, interior design, landscape architecture, planning and related fields of activity)
- Audiovisual (including film, video and broadcasting)
- Design and design services
- Performing arts (which includes theatre, dance and festivals0
- Information technology (including entertainment IT)
- Publishing, printing and related areas
- Cultural heritage (which includes handicrafts, museums and libraries)
- Arts which covers visual arts and applied arts
- Music (including music businesses and organisations)
- Advertising

At a state level, there is in general very good government coordination with the Ministry of Culture and the Ministry of Economic Affairs and Communications, the main players responsible for the development of the creative industries. As a result, the creative industries sector was included in Estonia's European Union Structural Funds Strategy for the period 2007-2013 and this facilitated strong development and interest in them. For the period 2014-2020, 20 million Euros is being invested in the development of Estonian creative industries including an allocation of funding from the European Regional Development Fund.

According to current Ministry of Culture statistics, the total production of the creative industries accounts for nearly 3 per cent of Estonian GDP with about 5,000 institutions and businesses active in the sector employing over 28,000 people.

In Estonia there is no national 'sectoral' strategy for the CCIs per se. Instead CCI development is seen as part of entrepreneurship, innovation, cultural and start-up policies. Apart from being identified as one of the priorities for Estonia's EU structural funds, supporting the creative industries was one of seven priority areas in the Operational Programme for the Development of the Economic Environment which also targeted internationalisation, innovation, access to capital, creation of new businesses, knowledge and technology transfer and the development of tourism.

Thus in this 'non-sectoral' holistic approach, similar to that of Finland, two strategies/programmes specifically focus on the creative industries. The Estonian Entrepreneurship Growth Strategy (2014-2020) stipulates that the development of creative industries is to be based on raising awareness, provision of company training, support for start-ups, sub-sectoral development and exports. The Operational

Programme for the EU Cohesion Policy Funds (2014-2020) similarly aims to raise awareness concerning CCIs, develop knowledge and skills (including training), support creative incubators and sub-sectoral development activities including establishment of regional and sectoral development centres.

The national entrepreneurial support programmes are the responsibility of Enterprise Estonia, which is one of the largest institutions in Estonia for entrepreneurship support. It provides financial assistance, advice, cooperation opportunities and training for entrepreneurs, research establishments, and for the public and third sectors. In 2009, it started an awareness-raising initiative with EU ESF funding - 'Creative Estonia' - to draw attention to the creative industries and promote creative entrepreneurship and creativity in society. 'Creative Estonia' (www.looveesti.ee) brings together different stakeholders to facilitate contact between creative professionals and businesses, policymakers, students and businesses from other sectors. 'Creative Estonia's' activities include a web portal collecting relevant information on the creative industries, web resources, and online advice and networking support for creative companies. It also produces publications on best practices, reports and studies, organises events throughout Estonia, offers media support for creative industries initiatives and generally raises awareness of the creative industries.

The objectives of the 'Creative Estonia' programme are therefore:

- to promote understanding of the creative industries and their value
- to create a platform for the discussion of creative industry problems and solutions
- to support new and established creative businesses
- to develop a positive image and the export potential of creative businesses
- to encourage cooperation between creative individuals and other sectors
- to create possibilities for cooperation networks
- to exchange expertise and information
- to present the Estonian creative industries model and experience to Europe
- to bring European best practices to Estonia.

The overall aim is to present the content, unique characteristics, economic, social and regional value of creative industries and to create a platform for the discussion of creative industry problems and solutions at the highest level. It recognised that a major problem most of the countries encounter is the lack of contact and cooperation between creative individuals and the industrial and service sectors. Therefore encouraging and increasing cooperation to make use of the abilities, talents and creativity of creative people is a priority.

The Creative Estonia portal gathers a lot of information and support material about creative industries in Estonia. It functions as a news portal for the sector in cooperation with partner organisations, offering up-to date information about events, studies, support measures and also featuring interviews and articles with outstanding people in the sector. The most visited pages focus on starting and developing a creative business.

In 2011 Creative Estonia produced "Creative Industries in Estonia"- a publication presenting the state of the industry in Estonia and the best examples to show that Estonia is a country committed to innovation and contributing added value. It set out amongst other things the support measures put in place by the state, as well as highlighting selected successful creative industry businesses and projects.

To encourage contact between businesses and creative people, Creative Estonia organises various events and seminars, open-coffee style meetings and short lectures where creative businesses and potential investors are brought together. To promote the idea of creative industries, Creative Estonia also participates in conferences to do with management, business and innovation as well as other areas, and seeks solutions to problems in the creative industries with input from key figures from local government to parliament.

One of Creative Estonia's initiatives related to starting and growing creative businesses was launched in 2011. PESA was, and is, a virtual product creating a service development environment where each year 20 companies with export potential from different parts of Estonia took part in a one-year support programme. There is a current programme PESA+ The PESA+ programme was developed in a cooperation partnership between Marketingi Instituut (Marketing Institute) and Creative Estonia and was co-financed by Enterprise Estonia from the European Regional Development Fund. PESA+ is designed for entrepreneurs involved in creative industries and consists of a web-based training programme, practical workshops and an international mentoring programme. Participants apparently value most in the PESA+ project the following:

- virtual learning, i.e. an opportunity to study from anywhere in Estonia
- the personal feedback
- inspiring trainers who take into account the specifics of the participating companies
- the teaching aids such as the training videos which are accessible for a long period and can be played back at convenient times;
- foreign mentors who know the market which the participants wish to target.

The training is for companies involved in creative industries that intend to begin exporting or have taken their first steps towards exporting but require more knowledge. The programme has four modules:

- 'Are you ready to export?' - introducing an export plan, selecting an appropriate product/service for export and reviewing the place of the company in the value chain. This first three-week module is virtual learning and includes short lectures, homework and subsequent weekly feedback
- 'Choose the right market!' is a four-week module and focuses on choosing export markets, conducting market research and drawing conclusions based on the results. This module is virtual learning and also includes short lectures, homework and subsequent weekly feedback.
- 'Prepare a smart plan!' - export schedules and necessary resources are reviewed. This two-week module is virtual learning and again includes short lectures, homework and subsequent weekly feedback.
- 'Sell, sell, sell!' practical training on preparing for sales meetings, negotiating tactics, networking and reviewing contract nuances. This module includes virtual learning, two face-to-face sales and negotiating classes and one networking event.

In addition to the PESA initiative, businesses and cultural organisations are also invited to free regional marketing seminars which take place once a year in five different towns in Estonia. There are also TeamLab product development days which take place twice a year. TeamLab aims to connect designers, engineers and managers in order to create new products. The first TeamUp was held in 2010 as a one-day-event. Other events followed.

Creative Estonia is the national host for the Creative Business Cup, the increasingly popular international competition for the creative industries. Creative Estonia conducts its work with advice from a think-tank that includes leaders from creative industries support structures and development centres and from the various creative associations.

Enterprise Estonia manages EU structural funds related to entrepreneurship. One of its extremely interesting initiatives has been the introduction of Innovation Vouchers and Development Vouchers.

Instruments available to support the creative industries both target the sector specifically but also are of a more general nature i.e. open to other sectors. The open instruments include, for example, cluster support programmes, export support and joint marketing programmes, skills and knowledge development programmes (e.g. design management training courses) and awareness raising and entrepreneurship promotion programmes (e.g. the Creative Estonia initiative). In addition to these general and open support measures, a sector-specific programme was created to fund development of different support structures, including creative incubators, hubs and centres which are seen as playing an extremely important role in creative industries development in Estonia.

The Creative Industries Support Structures Development Programme came on stream in 2009-2010 with seven creative centres and incubators funded. The creative incubators in Tallinn and Tartu started operating in 2009. In these two cases, approximately half of the funding comes from Tallinn and Tartu city councils, securing their commitment to creative industries development. The rest of the funding comes from Enterprise Estonia and EU Structural Funds.

As mentioned above incubators have played a prominent role in CCI development policy in Estonia. The Estonian national strategy for the use of Structural Funds for the period 2007-2013 identified creative incubators as one of the key components for fostering entrepreneurship in the cultural sector and creating favourable conditions for start-up companies. In Estonia the creative incubators are usually created and operated by either the local municipalities or educational institutions. The EU funding covers investment for infrastructure and equipment and part of the running costs.

The Tallinn Creative Incubator (http://inkubaator.tallinn.ee/eng/business-incubation-services/start-up-services/) is one of three incubators operated by Tallinn's Business Support and Credit Management Foundation. The main objective of the Incubator is to increase the business competitiveness of SMEs through cooperation and participation mechanisms, development and export support. The incubator is located in a well-known fashion industry building housing more than thirty start-ups encompassing jewellery design, glass arts, graphic design, photography, handicrafts, performing arts etc. The majority are start-ups in fashion design, interior design and 3D/4D animation.

The Tartu Centre for Creative Industries is the lead coordinator for creative industries development in Tartu and South Estonia. It provides creative industries-related information and training, legal and economic consulting for creative entrepreneurs, as well as business incubation and pre-incubation services. It is planned that the Tartu Centre for Creative Industries, will provide space for up to 40 start-up companies.

In 2015, Estonian Digital Centre together with Europe's first game developers accelerator, Gamefounders, and the International Game Developers Association of Estonia launched the Baltics' first start-up incubator for digital creative media companies, Digix. This Incubator project has been planned to produce up to 24 international digital media start-ups in four batches during a time-period of six months duration each.

In Estonia CCI development has been extensively funded from EU Structural Funds, including for example, under the Startup Estonia programme. Estonia invests large sums of its EU structural funds in cultural infrastructure, strengthening regional competitiveness and enhancing tourism as well as for human resource development (e.g. training unemployed in product development and entrepreneurship in handicrafts) and for digital society initiatives (e.g. digitalizing cultural heritage).

As just mentioned, part of the national strategy has been also to encourage municipal level support for creative industries development. The Tallinn Enterprise and Innovation Strategy 2014-2018 has a focus on creativity and entrepreneurship and the creative industries are the first on the list of the key development service sectors, along with tourism, transport and logistics, health and financial services. ICT is seen as Estonia's most promising sector and as cross-cutting and supporting all the other sectors. The Tallinn strategy sees the creative industries as a sector that both creates new ideas and innovation and as supporting other entrepreneurial sectors in terms of making Estonian businesses exports more attractive and competitive.

The network of bodies and institutions working on CCI development in addition to the Ministry of Culture, the Ministry of Economic Affairs and Communications and Enterprise Estonia and the 'Creative Estonia' programme includes various development centres:

- Estonian Centre of Architecture
- Estonian Contemporary Art Development Centre
- Estonian Design Centre
- Estonian Literature Development Centre
- Estonian Music Development Centre
- Estonian Theatre Agency
- Music Estonia
- Incubator Tallinn
- Tartu Centre for Creative Industries.

Tallinn University Institute for Futures Studies and the Estonian Institute of Economic Research have also been active on the Estonian creative industries scene.

The area of cultural and creative industries and general culture-related development is benefitting from experimentation and imaginative schemes both sector-specific and more general. This is allowing Estonia to catch up with the best that is happening elsewhere in Europe and to develop entirely original initiatives.

Enterprise Estonia, for example, has set up an export grant scheme for creative industries in order to provide support to enterprises who are about to start exporting or want to invigorate their existing exporting activities. The scheme recognises the fact that the creative industries can provide precious added value to regular products, thereby giving them a unique marketing advantage over competing products. In terms of copyright protection, their creation may be unique in itself, be it a project, service, design etc. The grants cover 70% of costs and are up to a maximum of 50,000 Euros.

Under this particular scheme grants are given to projects in which entrepreneurs who are active in the creative industries increase their export capacity by:

- exchanging information and contacts,
- conducting seminars, courses and study trips for entrepreneurs,
- organising networking events, development programmes, counselling and mentoring,
- developing new products and services,
- supporting the placement of new products and services on the market, participating at fairs, conducting research that is necessary to enter new markets.

Because Estonia is such an 'e-developed' country, most schemes are easy to access and non-bureaucratic. Another extremely useful programme, also managed by Enterprise Estonia, is the Innovation Voucher scheme mentioned in passing earlier. The scheme is intended for small and medium-sized enterprises that could need expert advice from specialists in order to implement changes. The programme supports the creation of first-time contacts between entrepreneurs and innovation service providers. The innovation voucher enables an entrepreneur (SME) who is cooperating with a higher education institute, test laboratory, or intellectual property experts, to develop innovative solutions for developmental problems, carry out tests with new materials, gather knowledge on technologies, conduct studies in intellectual property databases etc.

Activities that are supported include:

- consulting regarding product or service development
- consulting regarding production or technology
- conducting product tests and industrial experiments
- carrying out feasibility and cost-benefit research
- legal protection consultation, tests and registration regarding patents, utility models, industrial
- design
- consulting regarding metrology, standardisation and certification
- development and implementation of technological solutions.

In terms of mainstream cultural policy, this is laid out in a 2014 document which sets the priorities until 2020. It updates and complements the previous general principles of the cultural policy document adopted in 1998 with several significant provisions regarding the internationalisation and export of culture as well as the creative industries, the participation of Estonia in international cooperation and the impacts and trends resulting from the development of technology.

In September 2015 a directive was signed concerning funding for the support and development of the creative industries followed in January 2016 by the Creative Industries Support Measure Regulation which provided a new basis for the allocation of grants for the development of creative industries support structures, joint projects and export enhancement. The funding will be managed in calls by stages with the first call being for the provision of incubation services. The Ministry of Culture is the ultimate responsible state body for this programme with Enterprise Estonia administering the calls and allocation of grants. The programme again emphasises the Estonian policy of the linking of cultural and creative sectors to entrepreneurship policy in the expectation that it will lead to the development of "new and ambitious business models and encourages the development of products and services in other economic sectors". In terms of enhancement of export capacity the hope is that the number of Estonian CCI exporters will increase so that the sector will have an increased capacity to generate its own revenue. One measure of the success of the programme, as mentioned elsewhere in this report, will be the degree to which the creative sector can produce added value in other economic sectors.

The funding for the programme is coming out of the European Regional Development Fund and will be 20 million Euros of which 16.1 million Euros will be allocated through open calls for proposals. The Ministry of Culture will use the remaining 3.9 million Euros for the purpose of raising awareness, knowledge and skills related to the creative industries and also for the implementation of major projects which involve the creative industries with other sectors. The idea is to increase the role of the creative dimension in the products and services offered by Estonian entrepreneurs. The programme marks an approach to the creative sector which sees the cultural and creative industries as becoming more horizontal with more focus placed on increasing the synergy of different sectors. The creative sector has been described by one of those managing the programme as somewhat similar to the IT sector, the benefits of which are in strengthening other sectors and when the sector's strongpoints are used for smart solutions in other sectors. In short, it is hoped that combining knowledge and skills that are characteristic of the creative sector with those of other sectors will help create innovative and smart solutions to contemporary Estonian challenges. This certainly opens up a golden opportunity, hopefully in practice as well as in theory, for the relevant CCI players in Estonia to explore innovative relationships with the tourism sector amongst others.

Awareness in Estonia of the increasing importance of development of the cultural and creative industries can be seen by some of the administrative changes in the last couple of years. For example from 2014 design moved from being under the Ministry of Economic Affairs and Communications to become the responsibility of the Ministry of Culture following a design action plan. The Ministry works with the Estonian Association of Designers, the Estonian Design Centre and Enterprise Estonia. Funding for design mainly comes from Enterprise Estonia plus there are some grants coming from the Cultural Endowment of Estonia.

The festivals scene is growing in Estonia and certain festivals are making a big impact, both in Estonia and in its two Baltic partner countries, Latvia and Lithuania, as well as in some of the other Northern Dimension countries. At present the structures to promote and support the festivals sector are underdeveloped.[1] Given that festivals probably represent one of the easiest ways of linking the CCI and tourism sectors, development of strong representational festival associations both nationally and at the Baltic-Nordic regional level is of some importance as they can help create some of those many 'bridges' which are needing to be built between the CCI sector and the tourism industry.

An initiative has been taken by the Finnish, Swedish and Norwegian festival associations with the philharmonics of Latvia and Lithuania, and with the participation of Estonia (as well as with the participation of Denmark and Iceland) to set up a regional network of festival associations which would, after creating its identity, establish a strong web platform for information exchange, streaming of festival productions and marketing, and not least to the tourist industry. There is probably a need for a review, which this new institutional initiative could undertake, of festival business models operating in the region. The Edinburgh Festivals and the Flanders Festival are one source of experience which is being examined by the organisers of this initiative. So far there have been a few meetings and the hope is to draw on EU Interreg funding for further development. It is worth noting that a study carried out 5-6 years ago found that for every one Euro put into festivals in Estonia there seemed to be a four-fold return.

Like an increasing number of other countries, Estonia is also recognising the promotional and tourism benefits of encouraging the makers of films and TV series to shoot and work in the country. FilmEstonia has been set up by the Estonian Film Institute and following a decision in 2015 is from 2016 handling a new cash rebate scheme for encouraging incoming productions. The government had earmarked 0.5 million Euros for the pilot year of 2016, which is expected to increase to 2 million Euros in 2017 if the set targets are met. Funding will be semi-automatic and be for up to 30% of local spend.

The first project that signed a contract with FilmEstonia in 2016 under this new rebate scheme was the Finnish/Estonian historical drama The Eternal Road/Ikitie by the Finnish director AJ Annila, produced by MRP Matila Röhr Productions in coproduction with Taska Film. The project received 400,000 Euros of support on a local spend of 1.3 million Euros. The second recipient is a Danish children's animated film

[1] It is understood that at present neither Latvia nor Lithuania has a festivals association and Denmark is in the process of trying to create one.

Hodja fra Pjort by Karsten Kiilerich, produced by M&M Productions of Denmark, which received 43,015 Euros of support on a local spend of 143,000 Euros.

Tartu, Estonia's second largest city, also approved the launch of a regional cash rebate fund and set the fund's initial annual budget at up to 150,000 Euros. The fund will finance both production and postproduction in Tartu, and is available for feature films, short films, documentaries, animated films and quality TV series with a minimum of four episodes. The rebate is capped at 20% of local spend.

4. TOURISM SECTOR IN ESTONIA

Tourism in Estonia is being developed in line with the Tourism Act (which was originally passed in 2000) and by the National Tourism Development Plan 2014–2020. Under the latter, by 2020, Estonia will have invested approximately 123 million Euros in tourism development with the aim of increasing tourism by approximately a third.

The main strategic goals of the National Tourism Development plan are:

- increasing awareness of Estonia as a travel destination
- tourism product development
- development of tourism attractions of international interest
- regional tourism destinations.

Within the framework of the previous development programme for the period 2007-2013, approximately 200 million Euros were channelled into tourism development. Several major tourism attractions have been established or been given a makeover, including the Marine Museum, Tallinn TV Tower, the Road Museum and the AHHAA Centre in Tartu. Funding for the current plan is coming from both EU Structural Funds and from the state budget.

Tourism is growing and every year approximately three million foreign tourists (with accommodation) and over three million one-day visitors travel to Estonia. In 2014, the latest year for detailed official national statistics foreign visitors spent 1.39 billion Euros on tourism services.

Tourism is playing an important role in Estonia's economic development, the direct and indirect impact accounting for approximately 7% of Estonia's gross domestic product and 27% of exports. The number of foreign tourists visiting Estonia was bigger than ever before in 2014 and in total foreign tourists spent more than 3.9 million nights in Estonian accommodation establishments, which suggests that awareness of Estonia as a tourism destination is steadily increasing and its reputation is improving.

Tourism development will also support the achievement of the goals set out in the Estonia 2020 competitiveness programme by increasing Estonian exports and employment (especially by decreasing unemployment among young people) and contributing to the establishment of international transport connections. The entity responsible for the implementation of tourism policy is Enterprise Estonia through one of its divisions, the Tourism Development Centre.

The main aim of Estonian tourism policy is to increase the international competitiveness of Estonian tourism and to ensure sustainable economic growth by developing tourism services and by the export of tourism services. The officially identified challenges for tourism sector enterprises now are to:

- increase awareness of Estonia as a travel destination
- diversify the choice of tourism products and services and improve their quality
- increase the awareness of tourism undertakings of the opportunities for introducing new business models and product design
- ensure the availability of detailed and interesting tourism information all along the visitor's route
- improve the transport connections that are important for tourism
- develop regional tourism products.

Estonia's good reputation as a travel destination, it is argued, will help to promote the demand for other Estonian products and services, in addition to tourism services, all over the world. The markets with the best potential and the highest priority in terms of Estonia's tourism policy are European countries, especially Finland, Sweden, Norway, Russia, Germany, Great Britain and Latvia.

Target market strategies are being developed for these countries, part of a combined effort by Enterprise Estonia, entrepreneurs, regional destinations and Estonian representations abroad.

Another priority is the two most important long-haul markets, the USA and Asia.

Attention is also given to conference and business tourism marketing (MICE)[2]. In terms of domestic tourism new products will be developed focusing on increasing the demand during the low season.

Entrepreneurs that offer accommodation services must comply with the requirements established for accommodation enterprises during the period they accommodate visitors. Until mid-2014 accommodation enterprises had to register their activities in the register of economic activities but this procedure has since been abolished and registration is no longer required. There are approximately 1,600 accommodation enterprises in Estonia offering more than 40,000 bed places. Approximately three million tourists, two thirds of them being foreign tourists use these accommodation services which include hotels, motels, guest houses, hostels, holiday villages and camps, holiday homes and bed-and-breakfast.

Approximately 400 travel operators, half of them being tour operators and the remainder travel agencies that are mediating package tours of other enterprises, currently operate in Estonia. One important goal of current policy is to devise regional development plans for North, South and West Estonia and Tallinn. Organisation of international events and conferences is another area for development but it is recognised that more infrastructure is needed including, and already in the plans, a modern conference centre and a network of small harbours.

Apart from having conference and business tourism as development priorities, there is also to be a focus on improving the quality of cultural (including food and sports), nature, health and family tourism with appropriate services and products developed for them

The tourism information system, which consists of the Visitestonia.com website and tourism information centres, offers well-organised, customer-friendly, high-quality tourism information for both domestic tourists and foreign visitors. The aim is that an improved tourism information system will contribute to the export development of tourism services and improving international competitiveness as well as help improve the collection of information for surveys, market and customer analysis and for marketing activities and product development. The collection, organisation and distribution of tourism information is organised by the Tourism Development Centre of Enterprise Estonia in co-operation with local governments and regional and area tourism organisations.

The Estonian Travel and Tourism Association (ETFL) is a voluntary association of tourism industry employers. The full members of ETFL are travel agencies and tour operators, the associated members are transport companies, tourism organisations, educational institutions, hotels, insurance companies, foreign tourism organisations and other organisations that provide support services for the tourism industry. ETFL organises the main annual event of the Estonian tourism industry, Tourest, an international travel fair. Started in 1991 it is the oldest and biggest travel exhibition in the Baltic States. In 2016 the three-day Tourest attracted a record 521 exhibitors from 22 countries. For exhibitors it is the best opportunity to make contact with the Estonian travel industry. Visitor numbers reached over 25,000 in 2016.

ETFL has 72 members, of which 54 are full and 18 are associated members. Its main goals are:

[2] Meetings, Incentives, Conferences, Exhibitions/Events.

- Developing tourism
- Being a quality and reliability trademark
- Representing members' interest in evolving tourism politics
- Supporting members' activity
- Facilitating and creating new business contacts.

Its main activities are:

- gathering and passing on useful information
- briefing members
- developing the qualifications system in the tourism sector
- developing business contacts with Estonian and foreign tourism entrepreneurs
- generally representing their membership in appropriate ways

In Estonia there are several interesting areas of overlap between tourism and the cultural and heritage sectors. The current head of tourism development at Enterprise Estonia was for five years Director of the Seaplane Harbour Museum, when it was receiving national tourist investment funding for major redevelopment. Today it is one of about ten Estonian museums which have tourism as a source of income. Fifty per cent of visitors to the Seaplane Harbour Museum are foreign tourists but this is exceptional. Estonia has more than 200 museums, mostly funded from state or local authority budgets and so there is no real pressure for them to be entrepreneurial, although it was suggested that perhaps 30-40 are. Modernisation of museums is taking place and often in a context not only of their community function but also in terms of any potential tourism role. It is worth noting here that there is an annual Estonian Museums Awards event which includes a special tourism award, something that could be usefully copied in other Northern Dimension countries where there is no similar award.

There are other areas where there are direct tourism overlaps. One area relates to sustaining immovable cultural heritage through giving historic buildings new functions. For example, old manor houses in the regions are being restored with state subsidies and turned into new tourism objects or even being converted into privately-run hotels. Current restoration projects of this type which were due to be completed in 2015 included Hiiu-Suuremoisa Manor, Arukula Manor, Illuka Manor and so on. A new round of grants with an overall budget of 148,000 Euros for the renovation of manor schools took place in 2016 with the Minister of Culture announcing in line with current European heritage thinking that "Development into attractive destinations helps at the same time preserve and exhibit the manor ensembles and their cultural heritage."

As illustrated by these examples there is recognition and also many examples of using tourism as an instrument of heritage sustainability. In the Ministry of Culture's cultural policy strategy up to 2020 document there is explicit mention of the linkage between heritage conservation and tourism. Section 33.1 states that "Besides maintaining cultural continuity, heritage conservation should be regarded as a part of sustainable development and an economic advantage, including an important part of cultural tourism." Similar mention is made in the document in relation to museums. Updating museums is part of policy and there are some good examples of newly-created or newly-refurbished museums very much having a tourism focus. A good example is the Wittenstein Time Centre in the town of Paide. Designed by a creative team of Estonians it makes extensive use of IT and audiovisual aids to offer a slightly unusual and interesting experience. The museum was financed by Paide city council and ERDF funding.

Apparently some 20% of the audience of the national opera in Tallinn are Finnish visitors because of the low cost of opera tickets. Very useful in tourism terms because of course they stay overnight. As a result the Baltic ferry companies are promoting it very actively and one of the main hotels in Tallinn, the Viru Hotel, offers a special 'opera package'.

Enterprise Estonia also directly provides grants for promotion of 5-7 cultural and sporting events per year in neighbouring 'markets' as part of a long-standing tourist-focussed programme. One Enterprise Estonia programme for cultural marketing was originally only for one-off grants but now it has both one-off grants and separate grants for funding over a three-year period. The maximum grant amount for the latter is 200,000 Euros, with the maximum for a one-off grant being 65,000 Euros. Recipients have included Tallinn Music Week and the Black Nights Film Festival (see case study). Although the grants are specifically for marketing, not for development of the event itself, in these cases, it is very clear that there is an important spillover effect in relation to festivals. Both of these festivals have in recent times impressively grown their regional and international reputations and brands.

It can be seen that Estonian tourism does provide a motor or platform for Estonian culture and cultural organisations. It is also clear that from the point of view of Enterprise Estonia it has clear responsibilities and a clear agenda which is to increase the number of tourists, especially foreign tourists. Thus while it is interested in harnessing for example, local festivals, for tourism promotion, the cultural interest is nevertheless narrowly defined. In its tourism team it has an Events Manager who of course has an interest in cultural events though there is not a 'cultural person' per se. Similarly it was made clear that film destination management (i.e. encouraging shooting of films and TV in a particular place in order to make the place better known or to attract 'film tourists') is not part of Enterprise Estonia's remit but something for the Estonian Film Institute.

That said what was interesting was the suggestion that in Estonia the tourism and the cultural and creative sectors have at least two common problem issues. One is what can be described as the 'producer issue' which is connected to international marketing. There is a lack of producers who can make things happen and work on an international level. The second is the need to think big and generally raise standards.

In connection with the latter and related to the tourism sector, areas of current weakness include improvement of routes, signage and public transport facilities as at present for touring in Estonia one needs a car. This contributes to the fact that 50% of all tourism is confined to Tallinn.

One of the recommendations (see the regional report) coming out of our work concerns a targeted voucher scheme for CCIs specifically in relation to working with tourism businesses or sole traders. Estonia has a voucher scheme for the CCS/CCI sector working in other sector which came into existence in early 2016. It will be important to monitor how the scheme develops, where the demand comes from in terms of sector and what the results are.

Estonia already has experience of voucher schemes. Enterprise Estonia already runs a voucher scheme with both innovation vouchers and development vouchers. The innovation voucher can be up to 4,000 Euros and businesses can only receive it once. As mentioned earlier in this report, it is for the businesses to bring in external expertise to address specific problems, issues or business challenges. The development voucher can be up to 20,000 Euros and is used to bring in external support for implementation of the action needed related to a particular problem, issue or challenge. Additionally, in 2016 Enterprise Estonia introduced an Enterprise Development Programme which is targeted at already established companies with at least eight employees which are ready for fast-growth development and can develop and deliver new products and services. The Programme provides a business with appropriate services and funding in the form of loans, grants or guarantees.

Estonia, Latvia and Lithuania have worked closely over tourism promotion for many years in order to put the Baltics on the tourist map. In the health and well-being sector they set up in 2013 a Baltic Health Tourism Cluster as one part of multifaceted collaborations to compete and excel in the international market for this type of tourism.

5. CCI AND TOURISM SECTOR COOPERATION IN ESTONIA

Quite a high level of attention is given in Estonia to the links between tourism and the cultural and creative sectors. A reflection of this is found in the Ministry of Culture's cultural policy strategy to 2020 document where at section 36.5 which are the final words of the document it pronounces that:

"The state supports the innovative connection of heritage culture with creative industries and entrepreneurship. The state values creative and developmental activities and entrepreneurship based on heritage and heritage technology. Folk culture events and phenomena of intellectual cultural heritage develop cultural tourism in different areas of Estonia, therefore encouraging the local businesses of the area."

In general in Estonia there seems to be a high level of coordination and not only because it is a small country.

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

In an editorial in N Wind magazine with the heading the 'New North', the relationship of eight of the Baltic Sea countries is amusingly and perceptively described better than any lists of cooperation projects, case studies or statistics:

"Three Baltic sisters? Yes, this edition will only feature three, even though now there are eight of them. We speak of the eight Finno-Ugric, Baltic, Scandinavian sisters of the North. It seems like it was only yesterday that there were five adults and the three Baltic teenagers, but the youngsters grew up and they do not want to be copies of their elder siblings. They want to be themselves. If it wasn't for them, the life for the older sisters would be much more boring. The world will surely benefit from the creative identity of these former teenagers. It's just hard work for them to talk about themselves yet, but that's textbook Nordic modesty.

These eight sisters are the strongest sisters in the world. They have a secret arrangement help each other, and it's forbidden to mention it to others outside the family. Organisations, politics, businesses and a mutual mother - the Baltic Sea - are not the only elements connecting them; people who create inside this region act as a link as well. A strong link between strong sisters brought up by the North, where sunshine is rare and weather is cold, where locals have a windy sense of aesthetics that smells of the sea, dunes, rocks, steel, woods and resin."

In general the cooperation between Estonia, Latvia and Lithuania is exemplary by global standards and operates at all levels. Wise and active practical 'win-win-win' trilateral cooperation activity abounds, probably nowhere stronger than it has been in the case of the development of cultural and creative industries policies and in the tourism sector. While they nevertheless may be developing their distinctive ways in both those cases, in the case of tourism there are joint marketing strategies in place which are regularly updated quarterly by the national tourism agencies. There is a very established tradition and base for sharing experience

In relation to tourism, Estonia has cross-border cooperation programmes with both of its neighbours, Latvia and the Russian Federation, covering areas such as routes, food, nature trails and so on.

The degree to which the three Baltic countries cooperate is perhaps no better symbolised than at the 2016 Venice International Architecture Biennale where a Baltic Pavilion represented Estonia, Latvia and Lithuania with a project that won three separate national competitions and presented the three countries in one joint exhibition.

Another good example of the very special relationship the three Baltic countries enjoy is in the area of film. The Baltic film institutions signed a mutual cooperation agreement in Cannes in 2015. Co-productions between the countries have become significant in the last couple of years with the Lithuanian Film Centre providing grants in 2015 for ten co-productions with Estonia and Latvia.

Also in the film area, a new online cinema space is to be launched in 2017, bringing together some of the best films from Lithuania, Latvia and Estonia. 'Baltic View' will feature significant and exciting work from across the region and will often be the only place where the films can be legally seen online. A subscription service, it will be curated by a selected group of experts, including critics, festival programmers and cinemas. Set up by a Lithuanian company, it has been funded by the national film councils of all three countries.

At the CCI, level the heads of the enterprise agencies in the three countries meet systematically with issues such as CCI strategy/harmonisation on the agenda.

At the tourism level there is a Baltic Joint Committee for Tourism Development. For long-haul business cooperation it meets quarterly including for joint marketing activities in China, Japan and the USA.

World Heritage Sites: 2 Cultural

- Struve Geodetic Arc (2005) – jointly with Norway, Sweden, Finland, Latvia, Lithuania, Ukraine, the Republic of Moldova, Belarus, and the Russian Federation
- Historic Centre (Old Town) of Tallinn (1997)

Tentative List: 3 properties

- Wooded meadows (Laelatu, Kalli-Nedrema, Mäepea, Allika, Tagamoisa, Loode, Koiva, Halliste) (2004)
- Baltic Klint (2004)
- Kuressaare Fortress (2002)

Intangible Heritage Lists: 4 on the Representative List

- Smoke sauna tradition in Võromaa (2014)
- Seto Leelo, Seto polyphonic singing tradition (2009)
- The Kihnu Cultural Space (2008)
- The Baltic Song and Dance Celebrations (2008) – jointly with Latvia and Lithuania

Memory of the World Register: 1 inscription

- The Baltic Way - Human Chain Linking Three States in Their Drive for Freedom (2008) – jointly with Latvia and Lithuania

Creative Cities Network: 1 city

- Tartu, a UNESCO Creative City of Literature (2015)

Legal instruments: 15 ratified and 25 non-ratified

- International Convention against Doping in Sport: approval (17 August 2007)
- Convention on the Protection and Promotion of the Diversity of Cultural Expressions: approval (18 December 2006)
- Convention on the Safeguarding of the Intangible Cultural Heritage: approval (27 January 2006)
- Convention on the Protection of the Underwater Cultural Heritage: non-ratified
- Revised Asia-Pacific Regional Convention on the Recognition of Qualifications in Higher Education: non-ratified

UNDP HDI - Estonia is 30th (2015)

- European Destinations of Excellence

7. CASE STUDIES

7.1 *Clusters, Accelerators and Incubators*

In general in Estonia, and also in relation to creative industries development, there has been a strong policy interest, backed by investment including European Union structural funding in clusters, accelerators and incubators.

Clustering is where companies, organisations and individuals from the same industry, sector or sub-sector gather together in close proximity. It is not something new as even in medieval times certain trades clustered hence in historical towns one often finds a Fish Street or Bread Street and the trade guilds were similarly often based on clustering. Banking centres in cities such as London have thrived for centuries. Economists explain clustering as a means for small companies to enjoy some of the economies of scale usually reserved for large ones. By sticking together, businesses are able to benefit from such things as the neighbourhood's pool of expertise and skilled workers, easy access to suppliers and information channels (both formal and informal ones like everyday gossip in a bar or cafe). Modern high-tech clusters often gather around prestigious universities on whose research they can draw. Silicon Valley is near Stanford University, for example, and similar high-tech clusters have been set up in the Baltic and Nordic countries.

In terms of the cultural and creative industries globally the most well-known cluster is surely the Hollywood film industry. When the big movie studio system broke up in the 1930s it fragmented into a large number of what were really small specialist firms and freelancers. Clustering around Hollywood allowed each of these small units to benefit as if they had the scale of an old movie studio but without the rigidities of the studios' wage hierarchy and unionised labour.

The revival and promotion of clusters can seem paradoxical as location in theory should no longer be a source of competitive advantage in an era of global competition, rapid transport and high-speed telecommunications.

For startups, being in a cluster has some obvious advantages. Another important resource for early-stage start-ups is getting access to accelerators and incubators which offer opportunities to grow their businesses. Although trying to achieve similar goals 'accelerators' and 'incubators' are different concepts. Accelerators accelerate growth of an existing company, while incubators incubate ideas with the hope of either developing a business model or a company. In short, accelerators focus on the scaling up of an existing business while incubators are often more focused early-start-ups, ideas and innovation.

Accelerators and incubators both offer entrepreneurs and company founders good opportunities to develop their business. They not only help to grow businesses but often through them they have better chances of attracting venture capital investment for their start-up at a later point.

One difference between accelerators and incubators is how their programmes are structured. Accelerator programmes usually have a set timeframe where individual companies spend anywhere from a few weeks to a few months working with a group of mentors to plan their business and tackle any current or future problems. Accelerator programmes usually have a competitive application process and some programmes are very selective. One typical form of arrangement is that the businesses selected are given a small seed investment and access to a large mentor network in return for a small amount of equity. The mentor network will usually include a mixture of start-up executives and outside investors. The aim of the accelerator programme is to help a new company do roughly two years of business development in just a few months.

At the end of an accelerator programme, it is now quite common for the selected businesses to 'pitch' at some sort of open day attended by investors and the media.

Start-up incubators are normally for companies that are earlier in their development than those that go through accelerator programmes. While there are some independent incubators, in the Baltic and Nordic countries they are often in fact part of government-funded programmes related to innovation, entrepreneurship or SME development programmes. Some may be sponsored by venture capital firms and 'angels'. Some incubators have an application process, but others only work with companies and ideas that they come in contact with through partners. Depending on the sponsoring party, an incubator can be focused on a specific market or sector. For example, as in the case of one of the Tallinn incubators it is focussed on cultural and creative industries. Usually start-ups accepted into incubator programmes relocate to a specific place to work with other companies in the incubator and often incubators have shared space in a co-working environment, a monthly lease arrangement and some connection to the local community. Co-working is often an important part of the incubator experience.

Estonia-based start-up Wise Guys, the top accelerator in the Baltic countries, has recently launched a crowdfunding campaign, aiming to raise 300,000-400,000 Euros for investing in the companies participating in its programme in Tallinn in 2017. Accelerators are sometimes funded by closed groups of 'angel' investors who choose to invest through the accelerator to spread their risk across multiple companies, as well as to increase the chance of a successful outcome through the services provided by the accelerator. Investing in an accelerator cohort means making one investment in a portfolio of ten carefully selected international start-ups, given that in Estonia priority on such programmes is for businesses that want to export or have an international dimension.

start-up Wise Guys are building a platform that makes it easier for individuals and companies to invest and trade small amounts in early stage start-ups, making it more 'democratic' for ordinary people to take part in the future success of the companies. Usually, an investment in a start-up is tied up in the company until it is either sold or goes public, typically five to ten years or more.

A particularly interesting Estonian incubator is DIGIX which is the Baltic States' first creative industries incubator for start-ups working with the fast developing field of digital media. Set up in 2015, DIGIX is located on the premises of the Baltic Film and Media School, staying close to upcoming talent in the audio-visual, media, games and e-learning fields.

DIGIX runs a six-month programme for start-up companies less than two years old and working with any creative content running on digital screens, which includes everything from smartphones to cinemas. The incubator is funded by Enterprise Estonia with the purpose of nurturing creative talent into functioning businesses, with export of services and products as a main goal. Since its establishment, DIGIX has worked with over 20 start-ups, with a third of them already doing business abroad.

DIGIX alumni and current members include companies in fields as diverse as gaming, 3D modelling and animation, crowdsourcing digital heritage, music industry crowdfunding, augmented reality solutions for schools, virtual reality solutions for museums, real-time war-games tracking, auto-focus sensors for film cameras and so on. The incubator uses the help of over forty mentors from Estonia and abroad to help tune the teams' business models and creative content in weekly seminars and monthly business coaching sessions. DIGIX also organises the largest 48-hour creative industries hackathon in the Baltic countries, Loomehäkk, which attracts over 100 international participants.

While there probably needs to be a lot more research on the longer-term success rates of the incubators and accelerators in Estonia and in the other two Baltic countries, it would seem that those two business development models are working. The question perhaps then is could there be an incubator and an accelerator programme specifically designed for CCIs and tourism sector business partnerships to draw attention to and realise some of the potential synergies they would have by launching joint start-ups or cooperating in a more structured way?

7.2 *MELT - Bringing Creative People and Business People Together*

The MELT Forum is an annual event which brings together representatives of the creative industries and key people from other sectors in order to facilitate cooperation between them. MELT Board reports give examples of how different areas of creative enterprises could benefit from cooperation and thereby promote businesses. MELT invites companies who are in need of products or services to help refine ideas and create inspiring cooperation. The MELT Forum tries to demonstrate to companies that creative involvement is good for business and a sound investment for growth. What better name could a forum have that is organised to unite creative businesses and other businesses and explores how creativity can melt into business?

In 2016 the MELT Forum took place at Tallinn Creative Hub (Kultuurikatel) in Tallinn and brought together over 500 people interested in topics relating to improving cooperation between creative people and businesses. The Forum addressed different topics during five parallel sessions focussing on success stories of cooperation between creative persons and businesses in export, marketing, innovation, product development and sales activities. International speakers are amongst those leading sessions.

The sessions included such themes as ‘How can the creative industries help your company flourish?’, ‘Branding through a gastronomic experience’, ‘Do not focus on products and services, but on passion and trust!’, ‘Innovation and food’, ‘How to get cultural, entertainment and opinion leaders to grow your brand?’, ‘Why are business owners afraid to work with creative leaders? and ‘The technological-artistic era - between two worlds’.

This year the MELT Forum was organised by Tallinn Business Incubators in cooperation with Tallinn Entrepreneurship Office, Tallinn Creative Hub, the Estonian Design Centre, Creative Estonia, the Nordic Council of Ministers’ Office in Estonia and Enterprise Estonia.

Amongst other themes there was a gastronomic thread. For example, the Nordic food culture programme, New Nordic Food, was presented in which the traditional food sector has used creative inputs (designers, artists, etc.) in production and marketing, which increased company profits and gave the products more international appeal. A representative of Silver.Spoon, a Danish company which has become an international leader in the field of gastronomic experience design spoke about how together with their customers they have created special solutions to develop their short-term and long-term strategies. The company also has its own branded experiences such as ‘Guerrilla Dining’, ‘Wine&Grub’ and ‘Street Corner Kitchen’ that have contributed to the development of underground food culture in Copenhagen as well as abroad.

To get a flavour of the event, in addition to the gastronomic thread, two examples of presentations by other international speakers included a representative from Arla and Kuudes (Finland/Sweden), the largest dairy manufacturer in Scandinavia, who gave an overview of how package design has significantly increased their sales figures. A Finnish marketing specialist focussed his presentation on the importance of CCIs and of experiences and emotions becoming increasingly important to consumers. He suggested that the creative industries should focus more on creating intangible values because the material world is finite and people’s wardrobes get full. He argued that he intangible world, on the other hand, is infinite – emotions and experiences are limitless.

The words 'creative' and 'design' are still often misunderstood when it comes to business. How much value do they create? How can one use them? Are they really important? Most importantly, how can businessmen and creatives talk in the same language?

The MELT Forum is exactly the right type of environment and format for the tourism industry and CCIs to learn a common language and profit from cooperation. It is a replicable model either as a one-off event, as an annual gathering or an ongoing platform for sector-to-sector communication bringing together representatives of the cultural and creative industries with key people from the travel and tourism sector.

7.3 *Promoting CCI 'Value-Added' through Vouchers and Export Grants*

There is the anecdote about the tourist who is lost deep in the countryside on his way to a particular destination. He stops his car and consults a local peasant about to reach his destination. The peasant replies "If I were wanting to go there, I would not start from here." One can perhaps feel that anecdote to be true in terms of getting the tourism industry to the CCI sector and the CCI sector to recognise more widely the enormous potential of the tourism industry as a destination for CCI business and activity.

Exploiting the potential synergies of the two sectors is not happening automatically although, of course, as mentioned elsewhere in these reports, cooperation is happening but not at the level it could and should. Stimulation and incentivisation is needed.

A good example of targeted incentivisation can be found at Enterprise Estonia. This national agency has set up an export grant scheme for creative industries in order to provide support to enterprises who are about to start exporting or want to invigorate their existing exporting activities. The scheme recognises the fact that the creative industries can provide precious added value to regular products and thereby give them a unique marketing advantage over competing products. In terms of copyright protection, their creation may be unique in itself, be it a project, service, design etc. The grants cover 70% of costs and are up to a maximum of 50,000 Euros.

Under this particular scheme grants are given to projects in which entrepreneurs who are active in the creative industries increase their export capacity by:

- exchanging information and contacts,
- conducting seminars, courses and study trips for entrepreneurs,
- organising networking events, development programmes, counselling and mentoring,
- developing new products and services,
- supporting the placement of new products and services on the market, participating at fairs, conducting research that is necessary to enter new markets.

Because Estonia is such an 'e-developed' country, most government-supported schemes are easy to access and non-bureaucratic.

Another extremely useful programme, also managed by Enterprise Estonia, is the Innovation Voucher scheme. Vouchers are mentioned elsewhere in these reports and very specific reference is made to them in the regional/cross-country report. This voucher scheme is intended for small and medium-sized enterprises that could use appropriately expert advice from specialists in order to implement changes. The programme supports the creation of first-time contacts between entrepreneurs and innovation service providers. The innovation voucher enables an entrepreneur or SME which is cooperating with a higher education institute, test laboratory, or intellectual property experts, to develop innovative solutions for developmental problems, carry out tests with new products, gather knowledge on technologies, conduct studies in intellectual property databases etc.

Activities that are supported include:

- consulting regarding product or service development
- consulting regarding production or technology
- conducting product tests and industrial experiments
- carrying out feasibility and cost-benefit research
- legal protection consultation, tests and registration regarding patents, utility models, industrial design
- consulting regarding metrology, standardisation and certification
- development and implementation of technological solutions.

Estonia's experience of its voucher scheme and export grants facility needs more research but vouchers and export grants designed and targeted to encourage the tourism industry to use the cultural and creative industries' resources, expertise and talents to develop cooperatively innovative new products, services, experiences and events seems to be a move in the right direction.

7.4 *Tallinn by Design*

Estonia and the other Baltic countries, Latvia and Lithuania, as well as the Nordic countries, are all at various levels giving very high priority to design. It is easy to understand why. Many of the countries have a very strong and rich design tradition and design has become a major life-style issue for many people. Possibly most importantly, governments have got the message about the potential and actual value-adding dimension of design in other sectors especially in a globalising world where product distinctiveness is a major competition factor. It is the one area of the creative industries where it does not need imagination to see the synergies with other sectors, including travel and tourism.

In September 2016 the renowned Tallinn Design Festival (Disainiöö) took place for the eleventh time. The Festival itself shows how design has grown in importance in Estonia in the past decade. When the festival was conceived ten years ago it was a 24-hour-long presentation of Estonian design. Since then it has become an international week-long event with more than 90 intellectual, eye-opening, experimental, funny or entertaining opportunities to get an insight into current trends in both Estonian and global design.

This year the entire city was involved - everyone could participate as long as they had a spirit of experimentation and curiosity. During the festival, there were high-level exhibitions presenting design, showrooms, galleries, and exhibits by professionals and design schools. There was an international seminar, 'Redefining Design', with talks by innovative design experts who gave new meaning to the concept of design.

The traditional programme of the festival includes the Pecha Kucha Night[3], design auction, workshops for grown-ups and kids, flash talks, film and fashion performances. The festival culminated with the ceremony for the BRUNO design awards, the gala event for Estonian Design Awards. Foreign exhibitions included exhibits from Austria, Finland, Korea, Poland, the Czech Republic, Slovakia and Hungary and there was a special focus on design in the Baltic Sea region. Design excursions were also organised for the guests, and

3 An event originating in Japan where people have a very, very short time to show slides and present thoughts

social activities will also be taken care of. The main venues were Creative Hub (Kultuurikatel), Helios cinema and the Gallery of Architecture and Design with numerous satellite locations all over the city.

The Tallinn Design Map has helped tourists find good Estonian design for nine years. In 2016 it was turned into an online map. The Tallinn Design Map shows all the places with good Estonian design: cafes and restaurants decorated with Estonian design, museums exhibiting design, as well as galleries and design shops and charming urban spots. It is a very helpful and comprehensive guide for tourists interested in design or for those who want to find and take home something special from Estonia.

7.5 *Black Nights Film Festival (PÖFF)*

Festivals are already recognised as having the potential to have major economic impact on a local and even a national economy, not least through tourism, both domestic and incoming. A lot of the main research has been done on the big festivals such as the Edinburgh Festivals or the Salzburg Festival but even 'local' festivals, for example in France where they are ubiquitous whether as 'fetes votives' or the 'Pois Chiches' festival of a producer village, underpin in a serious way, the overall tourism offer.

If the tourism sector and the cultural and creative industries are having a dialogue it is in the area of their common interest in festivals. It is not uncommon, especially at local level, for funding support from local authorities to go into festivals as a de facto tourism expenditure rather than purely as a form of cultural or artistic support. The problem is that even in this area where there is sometimes dialogue each sector has its own specific goal.

The Tallinn Black Nights Film Festival (Estonian Pimedate Ööde Filmifestival – PÖFF) is an example of a festival which is involved in such a dialogue, in this case with Enterprise Estonia which is responsible for tourism promotion. The Festival is in receipt of a grant from Enterprise Estonia as described earlier in this report. The grant is not in fact to help develop the festival but to use it as a magnet for incoming visitors. Festivals are always hungry for grants and in this particular case the grant is used for overseas promotion of the festival in the context of attracting visitors to Estonia. The festival also cooperates with Enterprise Estonia, through the grant, by collecting statistics on incoming visitors as part of its audiences.

The Tallinn Black Nights Film Festival is one of the biggest and most highly regarded film events in Northern Europe. In 2014, the festival was recognised by the International Federation of Film Producers Associations as the only competitive non-specialized film festival in Northern Europe, a recognition shared by only 14 other festivals in the world, such as Cannes', Berlinale, Venice etc. which could arguably be said to rank in the fifteen leading film festivals globally.

The 2015 edition of the festival had more than 80,000 admissions, screened 289 feature films from 80 different countries and more than 700 film professionals attended the festival and industry events. In 2016, for the first time in the festival's history, all the films screened in the main competition were world or international premieres. The 2016 edition had three competition programmes: the International Main Competition, the International First Features and the Estonian Film Competition.

The festival organises a number of events including in 2016 three serious sub-festivals: an animation film festival 'Animated Dreams', a children's and youth film festival 'Just Film' and an international short film festival 'Sleepwalkers'. It also has a regular international industry section run in cooperation with the Baltic Event co-production market which returned for the fifth year. Events bringing together filmmakers from all over the world on 17-24 November. Some highlights included the annual conference of Europa International, a joint body of leading European film distributors, the European Film Forum Tallinn 2016 conference on the EU digital single market initiative held in co-operation with the European Commission and Storytek, the launch of a new bootcamp for intellectual property creators.

The festival takes place in Tallinn and Tartu with screening at nine locations including two Apollo multiplex cinemas, cinemas Artis and Sõprus, Kosmos IMAX, the Tallinn Zoo and the Seaplane Harbour Museum. The festival in 2016 again created a memorable celebration of film and culture for Estonian film followers and for incoming visitors and industry representatives.

Having been started in 1997 by Tiina Lokk who is still the festival's director, it started as a small Nordic film showcase with twenty-five films in the programme and 4,500 admissions. The festival has seen a dramatic rise in terms of numbers over the course of 20 years.

The festival includes two international competition programmes (Main Competition and Tridens First Features Competition), a traditional film festival programme with documentaries and feature films as well as programmes for short films, retrospectives and film related special events (concerts, exhibitions, talks and more).

As in the previous years, in addition to PÖFF's main programme in 2016 there was a wide selection of special screenings and non-competitive programmes like the Fashion Cinema, Doc@PÖFF, the Gourmet Cinema, the Midnight Shivers, sports movies in cooperation with the Estonian Olympic Committee, the Panorama programme which gives an overview of the masterpieces of the previous year's trends in the world of cinema and a selection of the most experimental and unique films in the programme Forum.

7.6 *Tallinn Music Week 2016 Official Mobile App*

Founded in 2009, the other big established European festival in Estonia is the Tallinn Music Week which is one of the major meeting points for Eastern, Western and Central European music and creative communities. It describes itself as a celebration of creativity, curiosity, freedom and quality.

It features some 240 international acts of various genres of music with mainstream concert venues supplemented by free pop-up concerts at unexpected locations in the city. It also hosts an important international music industry conference. It is attended by around 35,000 people and 1,000 music industry executives yearly (attendance was 4,000 in 2009). It has been acknowledged as an attractive tourism destination internationally by both the British newspaper The Guardian and the New York Times.

The festival inspires and brings into its ambit synergies with others. Cutting-edge contemporary art is shown during the festival in Tallinn's galleries and there is a two-day Design Market at Creative Hub (Kultuurikatel) showcasing the most exciting Baltic/Nordic design. There is also a gastronomic strand to the festival as carefully selected restaurants and eateries in the city offer special chefs' menus and other offers to festival visitors and there is also the Tallinn Craft Beer Weekend which features the latest international and Estonian beers. There is also a talks and lecture programme on music but also on other subjects. A new feature introduced into the 2016 festival was a one-day Creativity for Change Forum within the conference that brought together 'game-changers' from business, education, science, technology, arts, culture, civil society and policy making from all over the world.

The Tallinn Music Week 2016 official mobile app offered very convenient mobile information, maps, features and guidance for festival-goers. It made planning easy, allowed one to absorb the abundant festival information, to navigate without problem between the festival venues and events and stay up-to-date with event information in real time.

The app included information on the artists, the schedule and festival programme, on things to do, on the international conference and so on. It had a map, flagged up festival special offers and showed the special restaurant menus. The app could also be personalised based on one's individual preferences so that one could, amongst other things, create one's own schedule and also bookmark events, artists and venues.

The Tallinn Music Week is a good example of where using mobile technology and apps (or programmes) a festival can harness all sorts of local energies and then make sure that there is a tourist offer which is coordinated and user-friendly. Everyone wins through the creation of this app, including the restaurants as well as the audiences and visitors.

Like the Black Nights Film Festival there is a lot of industry themed activity and discussion. Encouraging inclusion of a theme like the one for this project - synergistic linkages between festivals or CCIs and tourism development - would very much help to raise more awareness of what is happening in this area and what is being missed.

7.7 *Unusual Tourism Routes*

"Dear Traveller, Thank you for taking some time and choosing this romantic, winding road to drive along from Tartu to Põlva or Võru. You are now on a trading road and warpath with a dignified and exciting history which, over many centuries, has connected Tartu, Kirumpää, Vastseliina and Pskov, and along which the horses of Swedish, Russian and Polish rulers have galloped. From the mid-19th century the road was ridden by stage coaches and a network of post stations was established along it, which is why it is called the historic [post road or] 'Postitee'. Today's Postitee is above all a clean and peaceful living environment, where people, animals and nature have plenty of room to breathe and lead their lives. Open-hearted visitors are always more than welcome here, too! May you find what you are looking for on the Postitee and enjoy searching for it!"

So reads the website introduction to Estonia's Postal Route. From 1944 to 1971 the Tartu-Võru roadshows had the status of a 'Road of All-Union Importance of the Estonian Soviet Socialist Republic'. During this period the design of the road was significantly changed when some sections were straightened, embankments and coverings were widened, and in some places even the location of the road was changed. Due to the completion of the new Tartu-Võru highway in 1972, the old Postitee became a side road. The section of the post road situated in Põlva and Võru Counties was not touched by major reconstruction and people have recently begun to value it for its unique historical heritage and untouched nature, which makes the area a great one to live in and a great one to visit.

In the mid-17th century the management of post traffic in Estonia and Livonia became the responsibility of the knighthoods. In order to ensure regular and unrestricted movement of mail and passengers, a well-functioning network of post stations needed to be established on post roads and the condition of the roads supervised. There were four post stations at passengers' disposal en route from Tartu to Võru: Tartu, Maidla, Varbuse and Võru. Of the four, Maidla and Varbuse have been preserved to this day. Both stations were built in the early 1860s. The Varbuse Post Station is the best preserved complex of its kind in Estonia. Today it houses the Estonian Road Museum.

One foreign visitor to Estonia who experienced the Postitee put a post on a holiday website as follows: "For a real journey back in time to the old days when Estonia relied on horses for transport instead of metal boxes with wheels that use horse-power, you might want to consider taking the scenic route of Postitee. Even if your final destination isn't Võru. You'll enjoy the sights and silence of this historic postal route. Along the road you'll find old taverns, stone post offices, manor houses old schools, the Estonian Road Museum and abundant natural sites as well. We've taken the drive and it's well worth it."

The point about routes is that they encourage visitors, especially inbound ones, to be more adventurous and if they are documented properly they make things easy, if they are well documented, for tourists who often do not have the time to research what a country like Estonia has to offer. Estonia's Postal Route, the Postitee, has an old-fashioned website in four languages, but no app or other contemporary tourist aid.

Another interesting Estonian route is the Onion Route! The Onion Route was created through an EU-funded project which established a network of seventeen tourism operators in eastern Estonia to develop common marketing approaches. The idea was to take better advantage of the many, but separate, cultural and natural attractions in the area, through a themed route - The Onion Route. The route offers quality products to attract culinary and cultural tourists.

The Onion Route is in the Lake Peipsi area, the fourth biggest lake in Europe and one of the highlights of the route is Alatskiv, about forty kilometres from Tartu, Estonia's second biggest city.

The Onion Route is being marketed as 'one area, two nationalities, three cultures'. The two nationalities are Estonian and Russian who live in the area and the three cultures are:

- Russian Old Believers
- Baltic German manor culture. The former Baltic German culture is represented by Alatskivi manor
- Estonian peasant culture

The Onion Route is a good example of exploiting the potential of a region's living cultural heritage and transforming an almost neglected area into a well-known multicultural tourism region. Do the CCIs have anything to contribute, apps, festivals, events or wherever to further enhance it?

7.8 *Old Tallinn with an Unusual Guide and Special Memories*

Often the simplest ideas work best. A professional photographer in Tallinn, Ernest Bondarenko, is using his talents in the tourism sector. He offers two very appealing 'experiences'. His first tourism product/service is the chance to "discover Tallinn's medieval Old Town with a friendly photographer" as he puts it in his publicity material. He suggests to visitors that they enjoy having their photograph taken at some of the city's most beautiful spots and if you are looking for that extra special souvenir of your trip to Tallinn then this tour might be exactly right. You will be led you through the medieval streets of the Old Town by a professional photographer who will photograph you at some of the city's most picturesque spots. He guides the visitor through the photo shoot so that they feel comfortable and relaxed, but most importantly, so that the result is the visitor ends up with fantastic posed shots.

The visitor taking the tour will receive at least 40 large pictures (in their original file size of 4250x2830 pixels with no logos or watermarks) per hour of the tour. The photographs will be retouched and corrected within 4 days (but usually on the same or the following day) and are sent to the visitor by email as a downloadable link. The visitor can also print the pictures and send them to friends as postcards (€1.50 per picture) and also transfer them to a USB flash drive at Mr Bondarenko's shop.

The tour is advertised as being suitable for single travellers, couples, families, friends and other small groups. Wedding photo shoots are also on offer. Included in the price are: "an enthusiastic photographer/guide, a professional photo shoot, lots of fun and smiles and at least 40 photographs (digital files) per hour of the tour"!

His second product/service is more expensive but also simple in concept and a fun experience. His publicity in this instance declares "Enjoy a glamorous photo shoot with a professional photographer in

Tallinn and look and feel like a top model or celebrity! Enjoy a glamorous new experience! Get a professional model portfolio. Make-up and hairstyling is included."

The shoot takes place in the Old Town, the baroque Kadriorg Park, by the sea, near waterfalls or in a studio. Transportation is included in the price. For an additional fee he can also rent a luxury hotel room, a limousine, a yacht or whatever the visitor's fancy requires.

Those visitors choosing this service receive digital copies of all the pictures from the photo shoot, plus 10 professionally retouched photos. Printing is available for an additional fee.

There must be hundreds of other ways of creative people earning their living or supplementing their income by looking at the possibilities to be found in the realm of tourism. As illustrated by this example, the idea can be very simple and need not require any serious business investment.

7.9 *Solo Sokos Hotel Estonia, Tallinn - Estonia in 93 Stories*

Solo Sokos Hotel Estoria is a unique 'story hotel' in the historic building of the Hotel Viru. The Hotel Estoria showcases Estonian design and tells Estonian stories. Every one of the 93 rooms tells a story about Estonia. Estonian design can be seen everywhere in the hotel which opened in spring 2014.

The interior design of the hotel was given to local designers including the noted Estonian interior designer Sigrid Valgma who used only high quality materials. Another designer who worked on the hotel was product designer Johanna Tammsalu who received the biggest number of awards at the 2016 Tallinn Design Night Festival'. She received both the young designer award SÄSI and the BRUNO product design award for her Nörk Rack rope rack system. The jury also appreciated her entrepreneurial mind-set that combines an elegant creator with sharp business thinking. The lamps in the Estoria were designed by her.

In each room of the Estoria Hotel, an Estonian organization tells an intriguing story to introduce Estonia to the guest who can examine a total of 100 stories in the lobby on each floor or in the form of an e-book. In total, the Estoria Hotel has more than forty partners including the Estonian Art Museum, Estonian National Opera and Ballet Estonia, Estonian National Museum, the Black Nights Film Festival, the Estonian Olympic Committee, the Song Festival Foundation, Museums of Virumaa, Tallinn Tourism Development Center, Enterprise Estonia, Puppet Theatre and the Museum of Puppet Arts, Tallinn Music Week, and many others. The idea of the stories is to create interest in Estonia in the hope that the, usually business, will return to the country with family or friends.

Awaiting the guest in the hotel rooms is a luxurious bed with a mattress made of materials improving the blood circulation of the skin surface which was developed by NASA. From the pillow menu everyone can find themselves one suitable for their own personal comfort. Breakfast, developed in collaboration with Estonian nutritionists, is based on the fact that it is the most important meal of the day. The breakfast is made from the best whole and raw materials - is healthy and full of rich flavours, again promoting an image of Estonia.

"High-level hotel services are a basic expectation for the guest. As a provider of all this we want to be the key to Estonia for the guest, "the Managing Director of the hotel is quoted as saying. The hotel is trying to will give its mainly business customers to get to know the attractions and services offered at various locations in Estonia.

The Estoria Hotel is a good example of the travel and tourism industry working with the cultural creative industries sector for mutual benefits and in this case promoting a shared Estonian vision.

7.10 *'Like a Local' website/guide and maps*

'Like A Local Guide' is a website and mobile app that helps travellers find "cool and cosy spots where locals like to spend their time" and helps them avoid 'tourist traps'. Tips are added by real locals who live and love their cities. In addition it is also a marketplace where locals can offer, and travellers can book authentic local experiences. These can include neighbourhood walks, traditional dinners, nights out on the town - almost anything.

The idea originated about four years ago when Estonian Kalev Külaase, a seasoned traveller, decided he had had enough of guidebooks being too formal and not always very helpful. He boldly left his day job to channel his experience into creating a guide that would help its users delve deeply into the local way of life. Kalev was teamed up with fellow Estonian and travel entrepreneur Ülane Vilumets. Together they have been changing the face of travel - starting with Tallinn and the other two Baltic state capitals and expanding internationally adding one city at a time.

Ülane Vilumets explains how they started out organising off-the-beaten-path tours in Estonia and publishing printed travel maps for cities in all three Baltic States. Figuring out how to grow Like A Local Guide into a global platform of crowdsourced tips was the natural next step. They were not typical startup founders looking, as many do, to get bought out by a big corporation.

They are a classic example of a start-up business which can take off if the local environment is right. Little by little, mainly from their own savings and profits from other ventures, they have been growing the business. At a critical early stage they used an innovation grant voucher to develop the mobile application design and concept in 2012. They received a small grant from Enterprise Estonia to develop the mobile application software in 2012-13 as well as a bit bigger prize money from a startup contest 'Ajujaht' and then a small investment from the Startup Wise Guys accelerator. In 2013 they received a European Social Fund (ESF) design consultancy grant.

Like a Local maps are available for Tallinn, Riga, Vilnius and Helsinki but their spread is now very impressive and includes information and local services related to over 100 major cities and an international network of 5,695 locals from 393 cities. The important development for them was extending beyond their website to their mobile app.

Their City Guide for Tallinn, where it all started, offers 284 best travel tips, 44 tours offered by 39 'locals', 61 best local sights and so on. Coverage of other cities varies in terms of the amount of content but hey have created an extensive and impressive website and a mobile app where the travel tips are being created by well-selected local editors of each city who know what they're talking about.

The marketplace dimension of the app and website is generating a lot of activity and sources of revenue for locals providing tourism/visitor services and products.

8. COUNTRY CONCLUSIONS AND OBSERVATIONS

At one level, for example in the area of heritage tourism, seen from one perspective there appear to be plenty of linkages between the CCS/CCI and tourism sectors. Festivals, museums and so on are also frequently on a tourist's agenda and the tourist industry certainly 'consumes' such cultural products. If, however, one takes a closer and more focused look there appears to be a second and different perspective. For all the examples where there appears to be a CCS/CCI-tourism relationship, our work seems to suggest that in general a high level of productive cooperation is not taking place and even where one can find examples of cooperation, it is often not systematic and not always an imaginative relationship creating longer-term or innovative synergies.

There are of course sometimes practical reasons for this. One small and concrete example is that a national tourism body or city tourism agency often works to long lead-times, often a year to eighteen months in advance, whereas in the area of the performing arts, for example, the 'product cycle' and planning time can be very short, too short for such agencies to include such activity in a promotional campaign. It may also happen such agencies are only interested in promoting a very limited range of CCS/CCI activity, such as the national opera or theatre and only the major festivals and museums. Other practical obstacles which can be identified are lack of time (especially to find out about each other's sector and how it works) and lack of common 'platforms'. One can cite in particular cases other reasons for general 'under-performance' in the relationship between the CCS/CCI and tourism sectors.

There are also areas where it is genuinely believed that cooperation is taking place between the two sectors but when in fact it is simply the tourism sector 'consuming' the cultural sector rather than engaging with it directly, productively and innovatively. Perhaps an illustrative example of this is that in one country the national tourism agency has a cultural tourism advisory group which of course is extremely sensible and positive. When however looking at its membership, the interesting thing is that while, as one would expect, it included representatives of cultural tourism companies etc, it did not have anyone on it from the cultural sector per se, not even as an observer.

Greater engagement of the CCI sectors and tourism sectors is needed at all levels. Their interests often directly overlap and, as already mentioned elsewhere in these reports, there are important similarities between them. They may also, if the relationship is right, be able to address each other's sector weaknesses. In the case of the CCS/CCIs the weakness is that in some areas it has a supply-driven, rather than demand-led, culture, tradition and way of working in contrast to the tourism industry. In the other direction, in the case of the tourism industry all too often there is a tendency to gravitate towards uniform commodification and failure to produce originality and distinctiveness which engagement with CCIs could bring.

One should be cautious when making generalisations but during our work we have gained the impression that the CCS/CCI sector and the tourism sector while travelling in the same direction are usually on parallel but separate tracks, not on the same track with a shared, mutually enriching agenda. The tourism industry is usually working in a context of continuous commercial pressure but greater, properly mediated, engagement with the CCS/CCI sector would open up opportunities for commissioning or identifying potential new products, services or events so important to an industry that is increasingly having to renew itself and which increasingly depends on creation of local distinctiveness. There is high awareness of the latter in Estonia and many good examples of where it is being addressed so the obvious increased linkage between an area such as creative tourism and the CCS/CCI sector should not be such a huge step in the particular case of Estonia.

The impressive progress that Estonia, and indeed Latvia and Lithuania, have made in the past fifteen years in terms of their tourism development augurs well for the coming years. The degree to which there has been progress is very clearly illustrated if one goes back to a UNESCO policy paper of the period 2001-2003 and one compares what was written then and what is happening now.[4] Similarly reading documents related to CCS/CCI development written ten years ago makes it very clear that while there may still be a lot to be achieved the progress has been continuous and real.

In the regional report a major observation we make and which we have as two key recommendations is that the reason that the CCS/CCI-tourism sectors' relationship is not working as actively and productively as it should is that first of all it has not been properly put on the agenda in either sector or in a practical way at a political or policy level and targeted incentivisation is needed.

When trawling through calendars of tourism industry events one was surprised that there were very few examples of where the theme, or anything close to it, of the CCS/CCI-tourism relationship featured. Similarly working with the tourism industry to develop new products, services, experiences and events was also very rarely a theme of CCS/CCI conferences or other professional gatherings.

Because there are only isolated cases where there is any grant scheme or other funding specifically intended to stimulate or create CCS/CCI-tourism linkages specifically this is another reason why there is not the practical focus on the CCS/CCI-tourism relationship that there should and needs to be.

As a small country, the gulf between Estonia's CCS/CCI sector and its tourism sector is less pronounced and less complex than in most countries and indeed, to take a concrete example, the head of tourism development at Enterprise Estonia was until his appointment director of one of the country's leading museums. As explained earlier in this report awareness of the synergies between tourism and the CCIs is explicit in Estonia in both tourism policy and cultural policy documents e.g. in the Ministry of Culture's cultural policy strategy to 2020 it states quite clearly in relation to the CCIs and heritage "The state supports the innovative connection of heritage culture with creative industries and entrepreneurship. The state values creative and developmental activities and entrepreneurship based on heritage and heritage technology."

As also described earlier in this report there was an extremely important and relevant development in Estonia in January 2016 with the introduction of the Creative Industries Support Measure Regulation which has provided a new basis for the allocation of grants for the development of creative industries support structures, joint projects and export enhancement. One measure of the success of the programme will be the degree to which the creative sector can produce added value in other economic sectors which of course would include tourism. Although in the regional report we argue for incentivisation very specifically for the stimulation of CCS/CCI-tourism sector partnerships, this wider and less specific Estonian scheme is nevertheless a very positive step in the right direction. Its possible weakness is that it is coming from an assumption that the CCS/CCI sector needs protection because it is misunderstood rather than misunderstanding and that the CCS/CCI sector is the answer rather than part of the question. The latter perhaps obscure comment goes back to those questions that were mentioned earlier in this report of the 'push-and-pull' nature of what is the right relationship between the CCS/CCI sector and other sectors and in particular in relation to the tourism industry. Who is the provider and who the supplier and the need for a demand-led model.

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[4] UNESCO and Estonian, Latvian and Lithuanian National Commissions for UNESCO: Baltic Cultural Tourism Policy Paper. Short version (2001-2003). http://portal.unesco.org/culture/en/files/23640/11033006043bct_short1.pdf/bct_short1.pdf

In general success breeds success, it may be a cliché but Estonia has been doing exceptionally well in many areas including in terms of developing its national brand/identity and development of the 'e-everything' national strategy which has almost certainly contributed to an improvement in people working well together and horizontally across traditional silos. That said, Estonia is not an exception in terms of the need to put the spotlight on improving the way the CCS/CCI sector and the tourism industry need to interact more effectively even in Estonia. There are two future possible potential opportunities to escalate this subject up to the high level which it deserves.

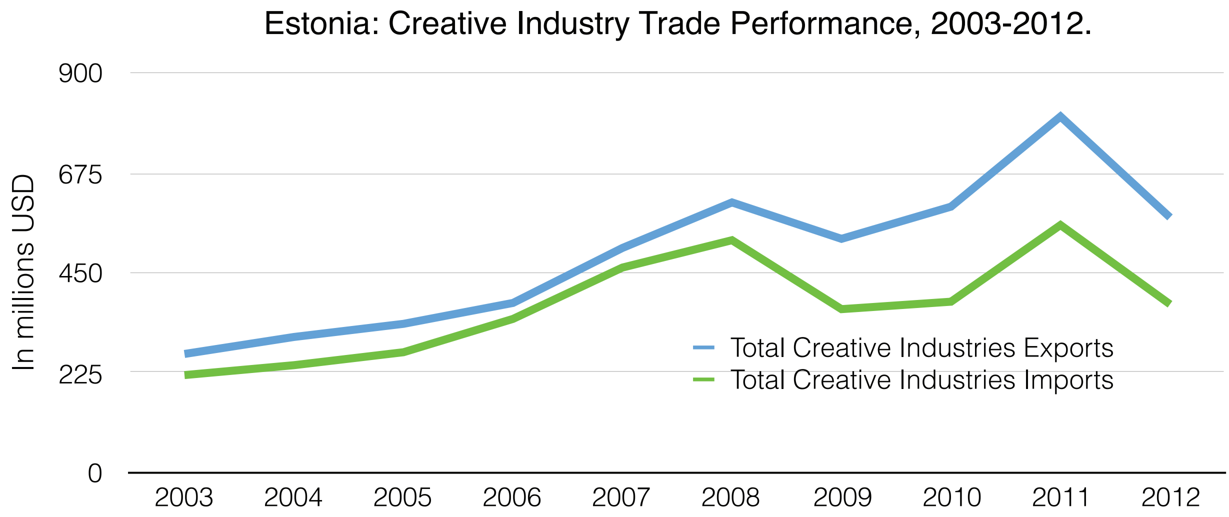
The first possible opportunity is that in 2017 Estonia will hold the Presidency of the EU which always allows a country to set agendas. Estonia has been very active indeed at a European level in relation to CCS/CCI development so it would not be out of place for Estonia to promote the CCS/CCI-tourism agenda and the general area of the CCS/CCI sector doing much more to foster innovation in the tourism industry.

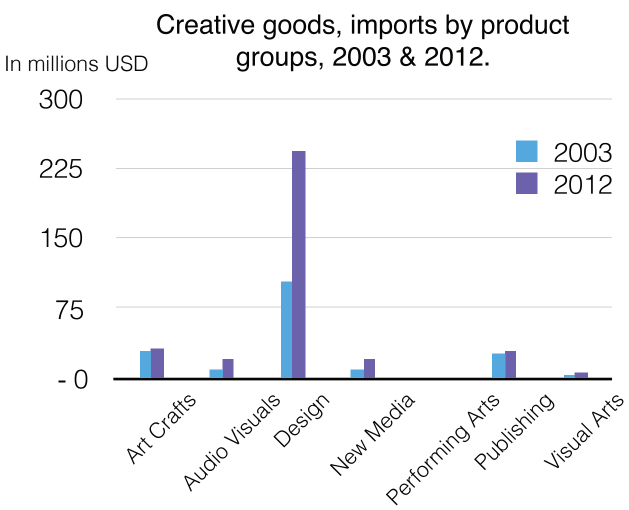
As in the case of Latvia and Lithuania, Estonia will also be celebrating its Independence Centenary in 2018 which should offer excellent opportunities to promote both its incoming tourism and its national brand and again, the CCS/CCI-tourism relationship and linkages.

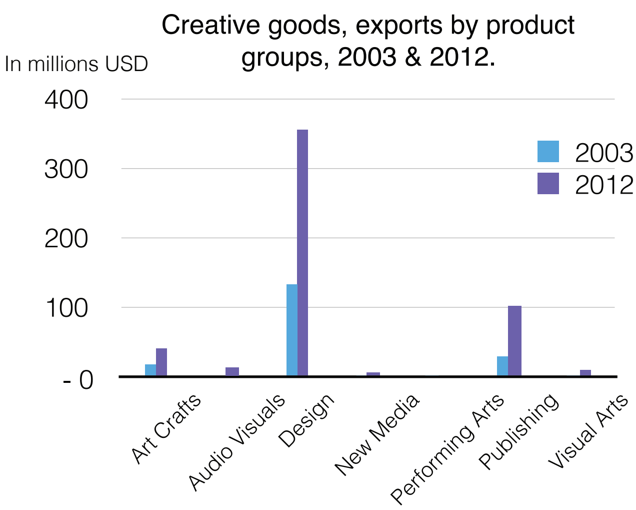
Estonia is very interestingly positioned in the Baltic cruise industry which we have not had sufficient time to explore and analyse but which has interesting ramifications in terms of the CCS/CCI-tourism sector agenda.

Appendix A. Key Facts and figures

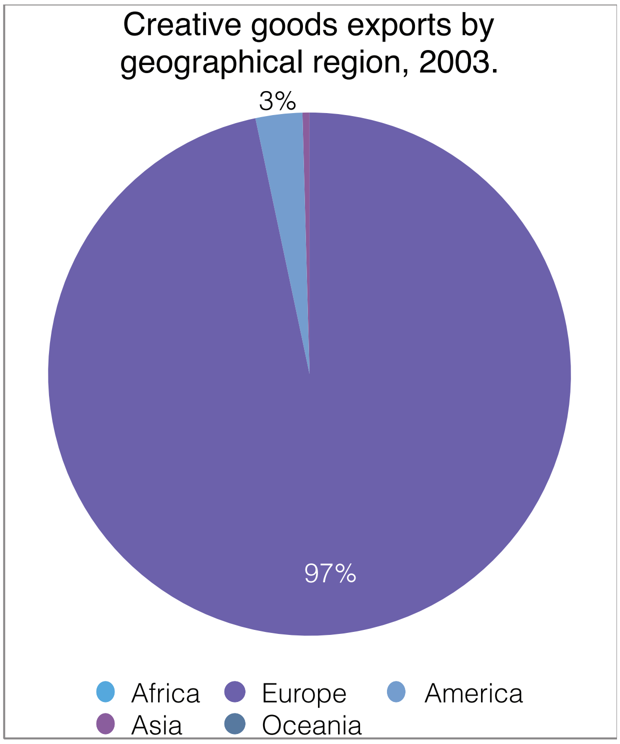
COUNTRY PROFILE - Estonia						
Creative Industries Trade Performance, 2003 and 2012						
Estonia	2003			2012		
	Value (in Million US$)			Value (in Million US$)		
	Exports	Imports	Balance	Exports	Imports	Balance
All Creative Industries	266.87	219.29	47.58	574.75	378.95	195.80
All Creative Goods	198.30	177.09	21.21	535.41	352.99	182.42
All Creatives Services	68.57	42.21	26.36	39.34	25.96	13.38

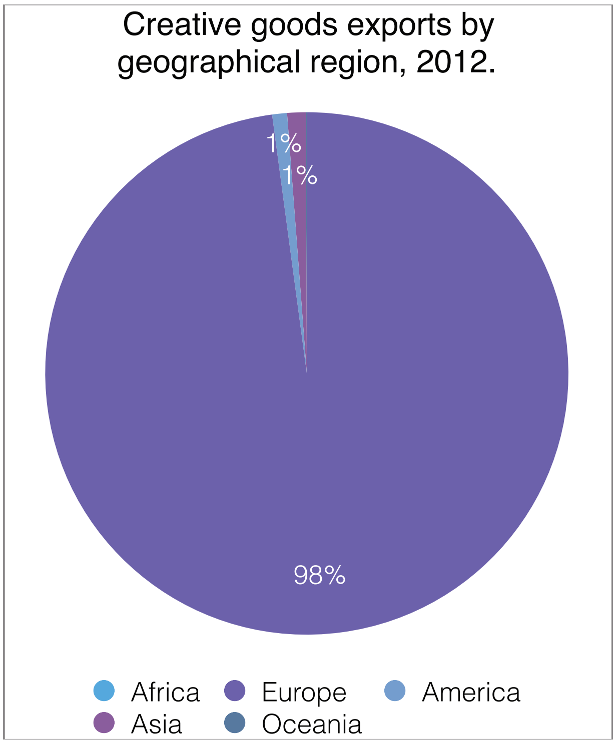






Creative industries exports increased from $266 million in 2003 to $574 million in 2012. Interior design, fashion, jewellery and toys are leading exports with a combined total of $356 million in 2012. Publishing is also a growing sector: Total exports rose from $29 million in 2003 to $105 million in 2012. There are more than 2,500 designers with a higher education and the number of designers entrepreneurs is growing according to the Estonian Association of designers.





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	Finland	43.86	12.91	30.94	Russian Federation	181.40	9.47	171.93
2	Germany	31.60	9.68	21.92	Finland	92.29	20.21	72.07
3	Sweden	25.93	3.68	22.26	Sweden	52.98	13.37	39.61
4	Russian Federation	14.38	6.93	7.45	Norway	41.55	4.37	37.17
5	Ukraine	12.79	0.42	12.36	Denmark	29.93	4.01	25.92
6	United Kingdom	10.78	3.45	7.33	Latvia	26.56	22.78	3.78
7	Norway	10.62	0.75	9.88	Germany	23.35	15.79	7.56
8	Latvia	9.80	2.90	6.90	Lithuania	13.10	7.40	5.70
9	Denmark	8.59	2.84	5.75	Netherlands	10.74	6.88	3.86
10	Netherlands	5.23	3.56	1.66	France	9.39	5.77	3.62

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

Appendix B. Key documents and sources

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