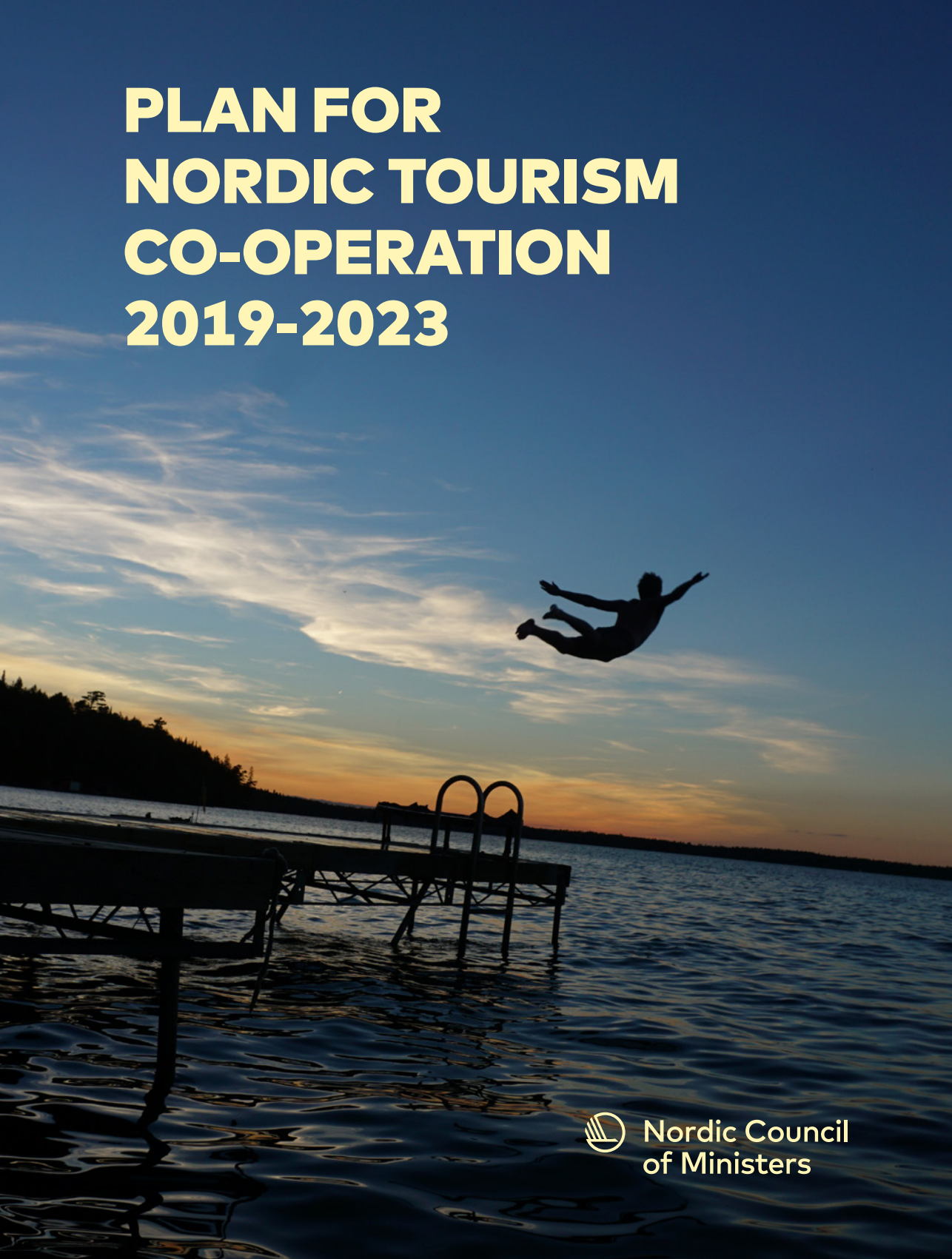


PLAN FOR NORDIC TOURISM CO-OPERATION 2019-2023



Nordic Council
of Ministers

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Nordic co-operation

Nordic co-operation is one of the world's most extensive forms of regional collaboration, involving Denmark, Finland, Iceland, Norway, Sweden, the Faroe Islands, Greenland, and Åland.

Nordic co-operation has firm traditions in politics, the economy, and culture. It plays an important role in European and international collaboration, and aims at creating a strong Nordic community in a strong Europe.

Nordic co-operation seeks to safeguard Nordic and regional interests and principles in the global community. Shared Nordic values help the region solidify its position as one of the world's most innovative and competitive.

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Contents

- 4 PREFACE BY THE ICELANDIC MINISTER OF
TOURISM, INDUSTRY AND INNOVATION**
- 6 EXECUTIVE SUMMARY**
- 8 SETTING THE SCENE**
- 10 THE PLAN**
- 16 IMPLEMENTATION**
- 17 STRUCTURES AND ORGANIZATION**
- 18 ENDNOTES**

PREFACE BY THE ICELANDIC MINISTER OF TOURISM, INDUSTRY AND INNOVATION

The Nordic countries have a long tradition of co-operating in various fields under the auspices of the Nordic Council of Ministers. In recent years, tourism has been actively placed on the agenda by the Nordic Council of Ministers. This is in full harmony with the growing importance of the sector on a global scale.

The Nordic countries enjoy a special position as tourist destinations. In all of them, beautiful nature, fresh air, a high quality of life and a focus on sustainability play a leading role. At the same time, each country in the Nordic region is unique. The Nordic countries can benefit greatly in tourism, as they have done in many other sectors throughout the years, from sharing their knowledge and best practices and by collaborating in various fields. A common Nordic Tourism Plan is intended to take advantage of this opportunity.

Tourism can be of great benefit to the economy of nations, but it can also present them with new challenges. The Nordic countries are no different to other tourist destinations in this regard. Therefore, the Nordic Tourism

Plan 2019-2023 presents four strategic themes that highlight those challenges while simultaneously providing us with many important answers. We do not need to re-invent the wheel on a regular basis. Instead, we can draw upon each other's experiences, strengths and solutions by co-operating in this sector through our valuable Nordic network.

All of the Nordic countries focus to some extent on issues that can be defined as belonging to the four identified themes of **competitive Nordics, innovative and smart Nordics, sustainable Nordics and attractive Nordics**. Innovative solutions to these issues are crucial to sustainable growth in the sector on a Nordic scale, while at the same time ensuring that the Nordic region enjoys a competitive position in comparison to other tourist destinations. This is an area where we can and should work together with our common interests in mind.

On behalf of the Nordic Ministers
for Business,
Pórdís Kolbrún R. Gylfadóttir,
*Minister of Tourism, Industry and
Innovation, Iceland.*



EXECUTIVE SUMMARY

In 2017, the Nordic business ministers (MR-Growth) decided that a Nordic tourism plan for increased Nordic co-operation should be compiled. A working group was established to develop the plan. The working group also initiated numerous projects with the objective of strengthening co-operation between the Nordic governments, e.g. the Nordic tourism policy analysis¹, which mapped and analysed current Nordic tourism

policies, framework conditions and other relevant public authorities, along with defining pan-Nordic challenges and areas for further Nordic collaboration. The Nordic tourism policy analysis serves as an important input to the Nordic tourism plan.

Tourism has sporadically been on the agenda in various Nordic Councils of Ministers in recent years. This Nordic tourism plan for the period 2019-2023



highlights the business ministers' priorities, unfolding in the four strategic themes:

- **Competitive Nordics**
- **Innovative and smart Nordics**
- **Sustainable Nordics**
- **Attractive Nordics**

The plan is closely linked with the Nordic co-operation programme for business and innovation policy 2018-2021, which sets out the framework for the Nordic business ministers' collaboration.

The plan is intended to strengthen Nordic tourism co-operation under the auspices of the Nordic Council of Ministers for Business (MR-Growth) with the purpose of enabling and ensuring sustainable growth in the tourism industry in the region, in

alignment with the 2030 UN sustainable development goals.² The plan will support national tourism strategies and policies by implementing activities linked to the plan's objectives, and address national and regional challenges more systematically.

The cross-sectoral nature of tourism requires policy co-ordination and collaboration across policy areas. Therefore, the Nordic business ministers invite the other Nordic Council of Ministers and institutions to co-operate on matters relating to tourism on a Nordic level.

Furthermore, the plan can contribute to the follow-up of the prime ministers' declaration of "Carbon Neutrality" published in Helsinki in January 2019.³

SETTING THE SCENE

Tourism has made a substantial contribution to job creation and growth globally. In all of the Nordic countries, the sector has gained increased political importance because of its growing economic impact. In the Nordic tourism policy analysis published in March 2019, the global economic impact of tourism is highlighted as one of the fastest growing sectors in the world economy.

The tourism sector is positioned at the extreme end of both the local and the global. It permeates economic, social, cultural and environmental conditions at all levels. The interaction of the global impact of tourism and the extent of its infiltration into the local backdrop makes the sector an important subject for developing relevant and modern public policies. This represents, at the same time, opportunities and challenges. The tourism sector has great potential for creating economic growth and development, while at the same time posing real challenges to communities, culture and the environment. While tourism can have a huge and disruptive impact on local communities and economies, the sector itself is susceptible to changes and trends, it is challenged by diverging

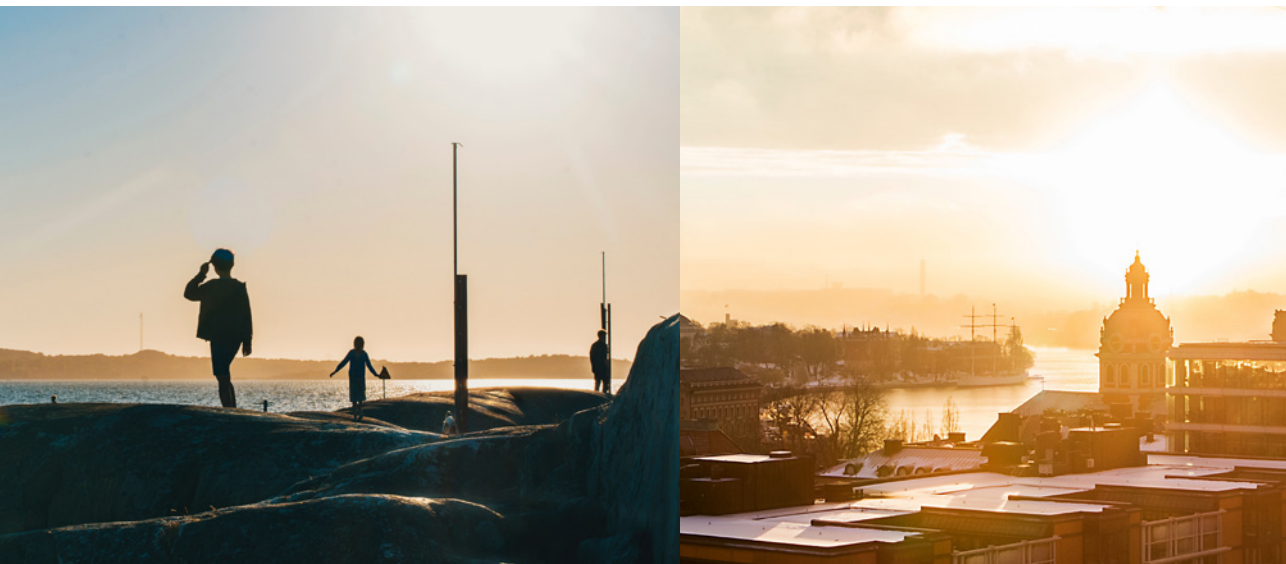
interests, and it is both fragmented and diverse. There is a strong awareness in all the Nordic countries of the complex interplay and often conflicting interests within tourism. Simultaneously, major global trends are currently shaping and changing the global tourism industry. Although their impact may differ throughout the Nordic region, these same global trends are the most important drivers of change for Nordic tourism. Among the most evident



trends are changing demographics among travellers and the emergence of new markets, digitalization and new and disruptive business models, as well as social, cultural and environmental challenges.⁴

The development of these global trends has been taken into account when prioritizing strategic themes for Nordic tourism co-operation for 2019-2023. It is also important to acknowledge

that there are no easy solutions for policymakers, as tourism is a complex sector representing several industries, where it can be challenging to identify and align common goals and interests. Any policy on tourism and frameworks for collaboration must therefore be able to deal with the complexity of the sector and the many converging interests it and the Nordic countries represent. The Nordic tourism plan is meant to address these above-mentioned issues.



THE PLAN

The Nordic business ministers' tourism plan will support national tourism strategies and policies by implementing activities linked to the plan's objectives, where national challenges can be addressed through Nordic co-operation. The plan will simultaneously contribute to creating Nordic added value through projects and more systematic co-operation. Exchange of knowledge and best practices will be emphasized.

The plan consists of identified strategic areas of collaboration. The implementation of the plan will be described in a separate action plan consisting of a number of concrete projects launched by MR-Growth. The action plan will be reviewed regularly. Implementation of projects and activities must take into account the fact that needs, challenges and potentials in tourism vary between the countries and regions in the Nordic region. Factors like geographical situation, population density, infrastructure and development of the tourism sector in various regions should be taken into account. The relevance for the various Nordic countries of participating can and will vary, depending on the activity.

The plan will establish a more structured collaboration between national policymakers and organizations in the Nordic countries, with the objective of developing and implementing tourism-related policies and projects. The Nordic Council of Ministers and relevant Nordic institutions will play a key role in implementing the plan. Simultaneously, collaboration with other ministerial councils and institutions with tourism-related issues on the agenda is welcomed, e.g. the policy areas of the environment and climate, culture, food, regional development and co-operation in relation to the Arctic. Political priorities, including the Nordic Council of Ministers' chairmanship programmes, can contribute to the plan's implementation.

PURPOSE

- The plan must strengthen Nordic tourism co-operation under the auspices of the Nordic Council of Ministers for Business (MR-Growth) with the purpose of enabling and ensuring sustainable growth in the tourism industry in the region, in alignment with the 2030 UN

sustainable development goals. Selected strategic themes based on assessment of common challenges and potentials will provide the framework for the co-operation. Activities should complement national tourism strategies and provide Nordic added value.

- The primary focus will be on collaboration between national ministries and publicly funded institutions which are mandated to work within various areas of tourism in each country and create the framework conditions under which the tourism sector operates. Simultaneously, the tourism industry's interests and perspectives play an important role in identifying specific issues of interest and implementing concrete projects.

STRATEGIC THEMES

- **Competitive Nordics**
- **Innovative and smart Nordics**
- **Sustainable Nordics**
- **Attractive Nordics**

Competitive Nordics

Objective 1: Increase the competitiveness of the tourism industry

In order for the Nordic tourism industry to be competitive, framework conditions need to be efficient and appropriate. This is relevant for large companies as well as for SMEs and micro companies. The respective ministries responsible for relevant framework conditions nationally are encouraged to increase their collaboration regarding the drawing up and implementation of tourism-related regulations and policies, with the aim of creating a competitive operating environment for sustainable growth in tourism. Evidence-based policymaking can be strengthened with effective collaboration regarding statistics, analysis and the exchange and development of best practices.

Priorities for co-operation

- **Better regulation:** The operating environment for the tourism industry can be improved by ensuring competitive and effective framework conditions in the Nordic countries. The benefits of a harmonized regulatory framework for tourism should be explored further when discussing freedom of movement

in the Nordic region for people and companies. This requires a more structured collaboration between Nordic policymakers in order to develop and implement tourism-related policies, including the development and implementation of Nordic and international best practices. Challenges and obstacles for cross-border co-operation could be addressed to ensure increased development of cross-border packages for visitors.

- **Comparable and comprehensive data:** Obtaining comparable data and information in order to monitor trends and compare developments will enable improved policymaking. More structured collaboration is proposed to improve the quality and comparability of data for national

policymaking, simultaneously providing possibilities for common Nordic statistics and analysis projects. Possible co-operation topics are related to sustainability in satellite accounts throughout the Nordics, exploring new data sources and methods (such as mobile data tracking) as well as piloting new statistics, developing anticipation methods, improving data visualization and piloting a common Nordic statistics dashboard.

- **Dialogue between policymakers and the tourism sector:** To facilitate dialogue between Nordic policymakers, organizations in the Nordic countries and the tourism industry representatives, Nordic tourism conferences will be arranged regularly at which policymakers,



institutions, the tourism industry, including cross-sectoral industries (e.g. food and culture), and other relevant stakeholders will be invited to discuss the potentials of increased Nordic tourism co-operation and the common challenges the region is facing.

Innovative and smart Nordics

Objective 2: Develop the Nordics as an innovative and smart destination⁵

Innovation is an important precondition for competitiveness, sustainability and growth. This applies to all sectors where the development of products, services and business models is inevitable, subject to increasing global competition. Therefore, utilizing the potentials of innovation, digitalization and technology development will have a substantial effect on the development of the tourism sector in the Nordic region.

Priorities for co-operation

- **Digital competencies:** The digital competencies⁶ of SMEs and destinations should be strengthened through Nordic initiatives. Common Nordic measures to support SMEs' capabilities to cope with digitalization needs can be related to sharing best practices and concrete initiatives. Best-practice cases of the smart and effective use of digital technology by destinations and tourism businesses can be collected and communicated.
- **Digital development and traveltech⁷:** Digital development and technological innovation in tourism can create opportunities for growth in the tourism sector. Internationally, travel technology is a priority area where there is considerable activity from start-up companies, investors and established companies. In the Nordics, the potential of innovation in the travel and tourism industry has been given less focus. The need for a Nordic platform through which to identify and activate collaboration between public and private actors, technology developers and investors can be explored in order to enhance utilization and boost traveltech in the Nordic region. Existing national and Nordic work regarding digitalization policies will provide solid ground for the upcoming work.
- **Smart destinations:** Collaboration with the aim of developing Nordic smart destinations can be strengthened, drawing on Nordic and international experience. Guidelines for regional and local authorities, tourist companies and SMEs on how to become a smart destination could be developed, building on digital means and destination development. This could include an effort to encourage innovation, business development and new business models in the tourism sector to accelerate the transition towards sustainability and growth within the sector.

Sustainable Nordics

Objective 3: Ensure sustainable development and growth

Tourism is one of the fastest growing industries in the world. Achieving the sustainable development of tourism implies complex processes that require policy and planning to take environmental, social and economic dimensions into consideration within a long-term perspective. This requires proper sectoral integration on local, regional and national levels. These challenges are important for all countries and should be approached in collaboration with other countries in the EU, OECD, etc.

The overall ambition for the tourism plan's sustainability efforts is to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs, while looking at the interlinkages between ecological, economic and social sustainability.⁸ The aim is to optimize positive impacts while minimizing negative ones, in alignment with the UN Sustainable Development Goals (SDGs).

Priorities for co-operation

- **A voluntary Nordic roadmap for sustainable tourism:** As political backup and prioritization is important to sustainable development in the Nordic tourism sector, Nordic ministers are encouraged to set priorities for collaboration on sustainability in tourism at Nordic level. A Nordic roadmap for sustainable tourism

could be developed, defining goals, actions and measurements for chosen prioritized actions. Nordic activities could help countries, regions and companies to measure the impact of various actions listed in the roadmap. Collaboration with other sectors within the Nordic Council of Ministers can be explored.

- **Methodology for sustainable tourism strategies:** Collaboration on developing best-practice policies and methodologies for sustainable tourism strategies can be strengthened. This could include collecting existing sustainability programmes in each country and gathering best practices from them. The formulation of a Nordic sustainability programme could be designed to inspire national policies.

Attractive Nordics

Objective 4: Make the Nordics a more attractive and competitive destination

In long-haul markets⁹, the Nordic region is typically seen as a single tourism region characterized and inspired by common ideas and values, although the characteristics of, for example, Scandinavia and the West Nordic region/North Atlantic obviously differ. Tourists from long-haul markets often wish to visit several countries on their trips to the Nordic region.

Marketing activities in long-haul markets have been a subject for Nordic collaboration for a long time, and will continue to be so. The conclusion of the Nordic long-haul markets analysis

concerning China is that there is huge potential in a more co-ordinated Nordic marketing approach. It is however important that the growth for which the Nordic countries are aiming is sustainable (e.g. spread out in time and space, attracting high-spending tourists who stay longer, etc.) and that the marketing activities can match those of the increasing competition. Collaboration between individual countries in the region can be strengthened, and collaboration between national tourism organizations and destination management organizations can be refined. Synergies with other relevant sectors could be explored, e.g. the food sector and culture sector. A free and dynamic culture sector is vital for the authenticity and sustainability of Nordic branding efforts.

Priorities for co-operation

- **Long-haul markets:** The collaboration between the Nordic visit organizations has been successful and should be continued and intensified. Collaboration could be realized in investigating market possibilities in long-haul markets and sharing national research on specific markets. The necessary marketing efforts to encourage long-haul visitors to stay longer and travel between Nordic destinations should be explored, including with the objective of addressing the environmental impact of tourism from long-haul markets and the importance of sustainability goals. Nordic Tourism branding and product

development towards long-haul markets can be strengthened.

- **Nordic branding:** It is recommended that opportunities for developing the Nordic Brand in long-haul destinations are explored in closer co-operation with the tourism sector, in order to ensure the best value for Nordic branding. Collaboration in communication strategies and a framework for tourism branding of the Nordic countries, in which an active dialogue is secured on common themes (food, cultural heritage, the arts, lifestyle, sustainability, etc.) and messages can be strengthened. Annual plans for ways to link and align to Nordic branding activities could be drawn up.
- **Use existing structures:** Regional co-operation, e.g. the NATA co-operation¹⁰ (between Iceland, Greenland and the Faroe Islands) could inspire the national visit organizations in Denmark, Finland, Norway and Sweden to undertake more systematic dialogue on a strategic level. This could also benefit the collaboration on an overall Nordic basis, including the Aaland Islands.

IMPLEMENTATION

MR-Growth is the highest decision-making body within the Nordic co-operation on business policy. The Nordic ministers for business are part of a council of ministers together with the Nordic ministers for energy and regional policies. Nordic co-operation on business policy consists of the Nordic Council of Ministers for Sustainable Growth (MR-Growth), the Nordic Committee of Senior Officials for Business Policies (EK-N) and Nordic Innovation.

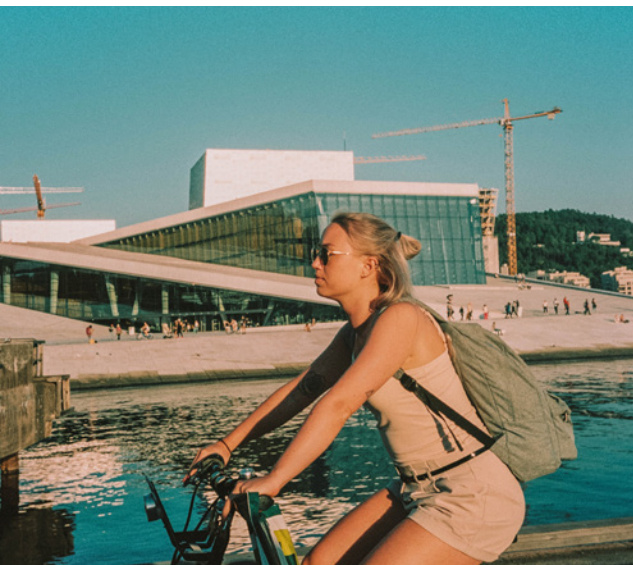
The Nordic tourism plan will primarily be put into practice in the annual budget of the Nordic Committee of Senior Officials for Business Policies (EK-N) and Nordic Innovation, as well as within the notice of funding for Nordic Innovation. In addition, it is expected that the business sector will be involved in cross-sectoral initiatives, e.g. in collaboration with other sectors within

the Nordic Council of Ministers and the Nordic Council. National ministries and institutions are expected to contribute to the plan's implementation. The Nordic tourism plan 2019-2023 will be carried out with concrete projects and activities in relations to the plan's goals. An action plan will be developed under the auspices of MR-Growth with the objective of implementing the Nordic tourism plan, and will be reviewed regularly. The plan must be implementable and have a clear ownership/division of responsibility. Individual countries (i.e. ministries, institutions and the like) can take a leading role in relation to individual activities and projects. Nordic activities can complement the respective countries' tourism policies and programmes, and create Nordic added value.

STRUCTURES AND ORGANIZATION

A Nordic tourism working group will be established. The group will be given a mandate to oversee the implementation of the tourism plan (including development of the regular action plan) and co-ordinate Nordic activities under the auspices of the Nordic Council of Ministers for business

(MR-Growth). Furthermore, the group will as needed facilitate co-ordination between the Nordic countries on issues of Nordic tourism and serve as a voluntary advisory group for Nordic committees and organizations on tourism matters. The group will report to MR/EK-N.



ENDNOTES

- 1 The Nordic tourism analysis was published in 2019. Ragnheiður Elín Árnadóttir, former Icelandic Minister of Industry and Innovation, conducted the analysis.
- 2 UN 2030 sustainable development goals. The 2030 Agenda for Sustainable Development, adopted by all United Nations Member States in 2015, provides a shared blueprint for peace and prosperity for people and the planet, now and into the future. At its heart are the 17 Sustainable Development Goals (SDGs), which are an urgent call for action by all countries – developed and developing – in a global partnership. They recognize that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve our oceans and forests.
- 3 The Declaration on Nordic Carbon Neutrality of 25 January 2019 was launched by the Nordic prime ministers and ministers for energy and climate. The declaration states the commitment of the Nordic governments to assess in 2020 the scenarios for how the Nordic countries can achieve carbon neutrality, including the implications for various sectors.
- 4 Árnadóttir (2019). Nordic Tourism Policy analysis.
- 5 Smart destination: Destination that uses technology in order to enhance the travel experience of the travelers, to improve efficient resource management and profitability with emphasis on sustainability.
- 6 Digital competencies: The ability to understand and utilize the latest and most relevant digital technologies and opportunities related to them.
- 7 Traveltech: Travel Technology refers to any use of technology used in travel and tourism both by companies and travelers
- 8 Sustainable development. Definition of sustainable development according to the Brundtland Commission: a) Sustainable development meets the needs of the present generation without compromising the ability of future generations to meet their own needs, and b) the definition of UNEP & UNWTO: Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.
- 9 Long-haul markets: Refers to markets for the Nordic countries outside of Europe. Today, the long-haul markets USA, China and India are the three most important markets for the Nordics, counted by the number of bed-nights.
- 10 NATA: North Atlantic Tourism Association (NATA). An organization established in 2006 that promotes and supports co-operation in tourism for the West Nordic countries: Greenland, the Faroe Islands and Iceland.





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- **Innovative and smart Nordics**
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