

## MEMBER STATES' ANNUAL TOURISM REPORTING TEMPLATE

*Article 3 of Council Decision 86/664/EEC<sup>1</sup> of 22 December 1986 establishing a consultation and cooperation procedure in the field of tourism stipulates that:*

*"...each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States. The Commission shall inform the other Member States thereof".*

*The following reporting form aims at facilitating compliance with this Council Decision.*

### SECTION 1 TOURISM ORGANISATION AND GOVERNANCE

**This section is aimed at reporting on the following:**

- **Administrative organisation**
- **Territorial organisation**
- **Organisation and links between the national tourism authority and the provinces / regions**
- **Organisation and links between the national tourism authority and industry associations, stakeholders and customers**

**1.1. Please provide a short description of the administrative and territorial organisation of public bodies responsible for tourism**, indicating the relationship and cooperation between national, regional and local bodies of the core responsibilities and competences of each department (Max. 3000 characters)

The responsible ministry for tourism policy is the *Ministry of Economic Affairs and Employment*. It is responsible for setting the priorities of the Finnish tourism policy and it develops the sector in cooperation with other ministries and sectoral actors. It is also responsible for the coordination of the measures supporting tourism, drafting of tourism legislation and for international relations in the tourism sector.

The Ministry of Economic Affairs and Employment chairs the inter-ministerial working group on tourism (MiniMatka), which is an unofficial entity providing exchange of information at the ministry level. Convening several times a year, the group is one of the entities implementing tourism policy and preparing tourism-related matters.

The Ministry of Economic Affairs and Employment set up a Tourism Cooperation Group for 2016-2018. This consisted of 35 industry leader members from different branches of tourism. Its main purpose was to define and prioritize from the industry point of view actions to promote the competitiveness of tourism, for inclusion in the next Government Programme.

In the beginning of 2018, Finnish Funding Agency for Innovation (Tekes) and Finpro (a provider of internationalisation advisory services) merged and formed a new operator called Business Finland. Business

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<sup>1</sup> <http://eur-lex.europa.eu/Notice.do?val=123070%3Acs&lang=en&list=123070%3Acs%2C&pos=1&page=1&nbl=1&pgs=10&hwords=>

Finland gathers under one roof all the services related to the promotion of innovation funding, exports, investments and tourism. The tasks of Finpro (including Visit Finland) and Tekes remained unchanged in Business Finland, but the ways of organising and producing services are unified. The general goal is to support the Government's aim of doubling SME exports by 2020. Business Finland receives its funding from the state budget.

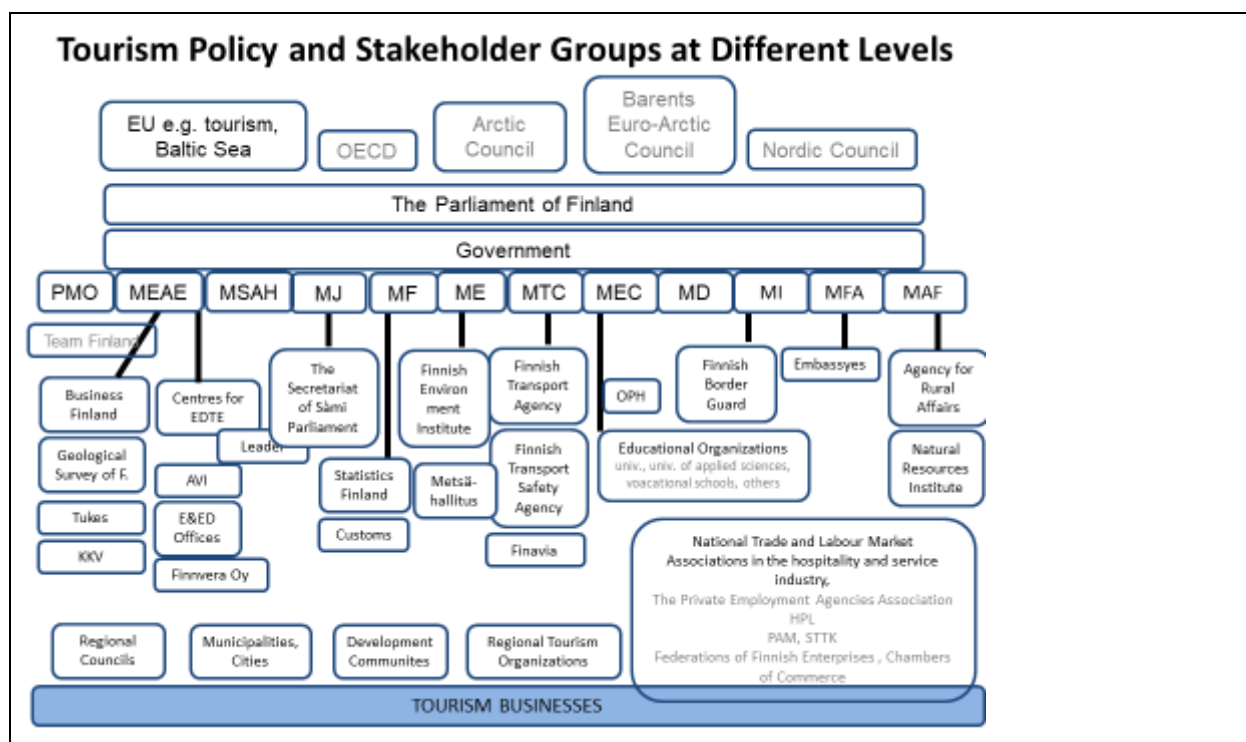
Visit Finland (as part of Business Finland) is a national expert organization responsible for promoting travel from abroad to Finland. Visit Finland helps Finnish travel companies to internationalize, develop, sell and market high-quality travel products. It acquires market information and data from the tourism development for the industry. Its main task is to promote Finland as a tourist destination by means of marketing. Visit Finland and the tourism industry conduct joint product campaigns and arrange familiarization trips for foreign tour operators and the media in order to support the promotion of Finland as an attractive destination, for instance.

In addition, other organizations supporting the tourism industry development in Finland are for example Finnish Safety and Chemicals Agency (Tukes) that supervises and promotes consumer safety, and Metsähallitus that manages nature conservation and hiking areas.

The Regional State Administrative Agencies carry out all legislative implementation, steering and supervisory functions in the regions. The Centres for Economic Development, Transport and the Environment (ELY) manage the regional implementation and development tasks of the state administration. They offer financial, advisory, consulting and training services to tourism businesses. A tourism sector manager acts as a national expert on tourism for all ELY Centres. The Regional Councils, as joint municipal authorities, are in charge of regional planning and supervise the development of the tourism sector.

There are also about 30 regional tourism organisations in Finland, and these have varied objectives, tasks and ownership structures. Locally, municipalities and local tourist information offices handle tourism issues.

**1.2.** Please provide an **organisation chart** reflecting the above described administrative and territorial organisation.



**1.3.** Please list and describe briefly the **relationship and main areas of cooperation between national/regional public tourism bodies and the most significant / active private organisations / stakeholders / industry associations / unions / consumer organisations.** (Max. 1500 characters)

**Finnish Hospitality Association (called MaRa in Finnish)**

- national trade and labour market association, operates as a voice for hospitality sector in Finland
- represents organisations such as hotels, restaurants, amusement parks, programme services
- 2800 member organizations, representing over 85% of the total turnover of the hospitality sector in Finland,

<p>include hotels, restaurants, amusement parks, tourism businesses and wellness service providers, to mention a few</p> <ul style="list-style-type: none"><li>- representation in various working groups and active cooperation at international level</li></ul> <p><b>Service Sector Employers Palta (PALTA in Finnish)</b></p> <ul style="list-style-type: none"><li>- represents service sector businesses and organisations in Finland</li><li>- Palta's role is to promote the interests of the sector and to enhance the growth and competitiveness of its members by improving the wider context in which businesses operate</li><li>- 1.700 member organisations which represent six different industries: logistics, information and communications, care and maintenance, business and specialist services, administrative and support services as well as entertainment and leisure</li><li>- representation in some working groups</li></ul> <p><b>The Association of Finnish Travel Agents (AFTA, SMAL in Finnish)</b></p> <ul style="list-style-type: none"><li>- looks after the interests of tour operators, travel agencies and incoming agencies</li><li>- AFTA has over 170 full members with almost 100 associate members, including airlines, shipping or land transport companies, accommodation businesses and tourism sector magazines.</li><li>- representation in various working groups and active cooperation at international level</li></ul> <p><b>Association of tourism organisations in Finland (SUOMA in Finnish)</b></p> <ul style="list-style-type: none"><li>- serves as an umbrella organization for regional tourism organisations, tourist centre organisations and tourist information offices in Finland and supervises their interests with respect to central organisations in the tourist industry, state tourist administration and other organisations operating in the industry, without seeking direct financial gain or benefits for its members</li><li>- it has 11 regional tourism organization members and 10 associate members and around 120 local tourism offices members</li><li>- presentation in various working groups</li></ul> <p><b>The Finnish Ski Area Association (SHKY in Finnish)</b></p> <ul style="list-style-type: none"><li>- the umbrella organisation of Finnish ski resorts, has a membership of 63 ski resorts and 49 ski schools, in addition almost 40 associate members.</li><li>- presentation in various working groups</li></ul>
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#### 1.4. What is the existing national/regional specific legislation on tourism? (Max. 500 characters)

<p>The principal of industrial freedom is very strong in Finland and it means that all EEA residents may carry on legal trade without a license from the authorities. Therefore, there are very few tourism specific legislations.</p> <ul style="list-style-type: none"><li>• The Act on Accommodation and Food Service Operations (308/2006)</li><li>• Alcohol Act (1102/2017)</li><li>• Act on Travel Service Combinations (901/2017)</li><li>• Act on Providers of Travel Service Combination (921/2017)</li><li>• Act on the Supervisory and Insolvency Protection Fees for Providers of Travel Service Combinations (922/2017)</li><li>• Consumer Safety Act (920/2011)</li></ul>
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## SECTION 2 - MEMBER STATE ECONOMIC DATA AND TOURISM BUDGETS

*This section is intended to provide an overview of the key statistical information about the general tourism economic environment of the Member States.*

The statistical data provided in the tables below shall cover the year 2017 and, **if available**, 2018.

The data collected through these sections could also feed into the Virtual Tourism Observatory.

**Please use the Excel templates provided below** in order to facilitate coherence and comparability of the data.

**Please note that you are only requested to fill in data that is available in your country. Please insert "N/A" for those that you are not able to provide.**



Data Sheet MS  
Annual Reports tem

### SECTION 3 NATIONAL TOURISM POLICY AND STRATEGIES

*This section aims at collecting information on the Member States general strategic vision as well as the specific objectives of their tourism policies.*

**3.1. Please provide information in bullet points on the key mission, main medium and long-term objectives and the main targets of your national tourism policy. (Max. 1500 characters)**

"Achieving more together"

Key mission: Tourism brings wealth and prosperity and employs throughout Finland.

- Support growth and renewal in the Finnish tourism business
- Offer a competitive operating environment for companies aiming at growth and internationalisation.

Growth-oriented and networked tourism enterprises with expanding international operations have priority when public subsidies are provided. Funding is also directed at areas providing the tourism industry with stronger operating prerequisites, such as transport connections, improvements in energy-efficiency and the maintenance of national parks and hiking routes.

**3.2. Do you have a multi-annual national tourism strategy specific / relevant for tourism in place? If yes, please describe in bullet points the main medium and long-term objectives of the strategy as well as who is responsible for its implementation. How is the implementation monitored and how often? (Max. 2000 characters)**

The current tourism strategy in Finland is the Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025. It will be updated during the first half of 2019. The aim is to make Finland the number-one tourist destination in Northern Europe by 2025. The theme for the roadmap is "Achieving more together" and its strategic focus areas are:

- Collaboration and partnerships: Strengthening the theme-based collaboration of tourism centres and networks of tourism related companies, as well as new openings in product development, sales, and marketing.
- Interesting offering: Developing competitive and versatile offerings from the interfaces of tourism and other fields.
- Increasing the effectiveness of marketing activities and making the travel services offering easier to buy.
- A competitive operational environment for tourism that supports growth and renewal.
- Accessibility and functioning travel chains to support growth in tourism.

Various different measures have been taken to support the goals of the roadmap. In order to ensure its implementation and effectiveness, the strategy has been monitored twice: at the end of 2016 and at the end of 2018. The results of the monitoring work revealed that most of the measures had been completed or were in progress.

Ministry of Economic Affairs and Employment of Finland is responsible ministry for tourism policy and thus, coordinates the implementation of national tourism strategy. The strategy is, however, inter-ministerial and calls for industry, development and education representatives, to mention few, for its implementation also.

Specific tourism programmes and government initiatives in line with the roadmap include e.g:

- Finland Air Transport strategy 2015- 2030, various cultural policies and a Government report on food policy (Food 2030), where one of the objectives is to strengthen food tourism.
- Finland's Strategy for the Arctic Region and the related action plan updated in 2017, which include sustainable tourism as one of four priorities. The Arctic sustainable tourism destination programme will be carried out in 2018–2019.

- Finland's updated (2017) Baltic Sea Strategy draws attention to the importance of sustainable and inclusive tourism.
- The growth programmes FinRelax, Finnish Archipelago and StopOver Finland incorporated various development, sales and marketing activities and were implemented in 2015-2018.

The importance of tourism for the growth of Finland's economy is recognised by the Government: the Government decided in its mid-term review in 2017 to allocate additional funding for tourism development. This additional funding amounts to EUR 16 million for 2018–2019. Additional funding has been allocated to supporting marketing and the work of Visit Finland, enhancing digitalization in tourism, tackling seasonality and finding new solutions to workforce supply and demand problems in the tourism sector. Furthermore, steps to reduce the regulatory burden will be important in enabling investment and development of tourism facilities.

The Government has also been fostering growth through its packages of employment and entrepreneurship measures. The measures within these packages have also benefitted the tourism industry.

#### 4. TOURISM CHALLENGES, MEASURES AND INITIATIVES

*This section aims at collecting information on the challenges the Member states and the tourism industry has to deal with as well as the measures put in place to tackle them.*

##### 4.1. Please identify the key challenges for the tourism sector in your country and indicate their importance /priority in the table below.

CHALLENGES	IMPORTANCE / PRIORITY		
	HIGH	MEDIUM	LOW
Diversification of the tourism offer	X		
Protection of the cultural heritage		X	
Protection of the natural heritage		X	
ICT and innovation, digitalisation	X		
Collaborative economy in the tourism sector		X	
Connectivity and transport	X		
Employment in tourism – improving the perception of the sector as a career opportunity	X		
Improving education and skills in tourism		X	
Combatting seasonality	X		
Demographic changes		X	
Improving accessibility of tourism		X	
Improving socio-economic data in tourism		X	
Economic crisis and recovery		X	
Improving investment in the sector		X	
Improving the sustainability of tourism offer	X		
Combatting climate change		X	
Improving the quality of tourism offer		X	
Developing responsible tourism practices	X		

Competition against other destinations		<b>X</b>	
Administrative / regulatory burden, bureaucracy, improvement of the business environment	<b>X</b>		
Other, please specify			

**4.2. Please describe briefly the main measures in your country aimed at tackling the key high-priority challenges indicated above. (Max. 2000 characters)**

The Tourism 4.0 action programme is a package of measures to promote the international growth and renewal of the Finnish tourism industry in 2018–2019. Additional funding of EUR 16 million has been granted to the programme to ensure that the tourism industry continues to grow fast by investing in

**Tourism marketing by**

- reinforcing Visit Finland's greater region cooperation between the Helsinki Metropolitan Area, Lapland, the Lakeland region as well as the coast and archipelago region;
- advancing the efforts to attract and activate foreign investments in Finland through marketing communications;
- producing marketing material on nature tourism for the use of tourism businesses and organisations; and
- developing the statistics on vacation cabin rentals.

**Reinforcing the digital competence of tourism businesses by**

- providing corporate training to develop the competence of tourism businesses (Visit Finland Academies) and by facilitating the access of products into electronic channels (MyStay, e-manuals, etc.);
- improving the content, coverage and accessibility of the Nationalparks.fi and Excursionmap.fi services;
- promoting the infrastructural growth environment of digital business.

**Developing year-round supply by**

- developing tourism products and service structures within the themes of nature tourism, health tourism, food tourism, culture tourism and sustainable tourism;
- preparing an action programme to respond to the challenge of labour mismatch in the tourism industry; and
- reviewing the impacts of moving school summer holidays on Finnish tourism industry.

The action programme will also contribute to **reducing and smoothening the regulation**, including in the organisation of events.

**4.3. Please identify if any of the above mentioned challenges relate to any legislative measures at EU level, and how. (Max. 1000 characters)**

**4.4. Please identify and describe any measures implemented in your country to increase tourism flows from other EU Member States and from third countries. (Max. 1000 characters)**

Please see 4.2

The strategic projects for 2015–2018:

- Finrelax – Turning Finland into a top country of wellbeing tourism
- Making the Finnish archipelago internationally known
- Finland Stopover – making Finland a leading stopover country
- Making digital tourism services easy to find and buy

**4.5. Please describe how promotional measures implemented in your country make use of / capitalise on the promotional campaigns carried out by the Commission (i.e. Ready for Europe, Europe. Wonder is all around, European Destinations of Excellence (EDEN), low-season tourism campaigns, etc.). (Max. 1000 characters)**

In 2018, Finland applied and was accepted for EDEN competition that will be carried out in 2019. Competition will increase the visibility of tourist destinations and provide new opportunities for networking with local and regional actors. The EDEN competition will be for the fourth time in Finland.

**4.6. Please identify and describe any measures /actions in your country which contribute to maximising the potential of national policies for developing tourism (e.g. ensuring that tourism interests are taken into account in the development of other policies which may have impact on tourism). (Max. 1000 characters)**

**The inter-ministerial working group on tourism (MiniMatka)**

- An active group already for 19 years
- Main task: to enhance the cooperation and communication between ministries in tourism policy, to implement Finnish tourism policy
- To prepare together Finnish tourism strategy and tourism related matters for Government Programme, national strategies (e.g. Arctic strategy, Baltic Sea strategy)
- All members are specialists who
  - o take into account tourism in programme preparation, statements, speeches, communication, financing decisions as a part of their work
  - o communicate actively about tourism and the positive possibilities of industry with positive and commonly agreed messages (especially regarding to tourism numbers)
  - o spar and support other members in preparing tourism related issues
- Members of the working group include
  - o Ministry of Economic Affairs and Employment
  - o Ministry of Agriculture and Forestry
  - o Finnish food Authority
  - o Ministry of Transport and Communication
  - o Ministry of the Environment
  - o Metsähallitus (Forest administration)
  - o Ministry of Education and Culture
  - o Ministry for Foreign Affairs
  - o Centre for Economic Development, Transport and the Environment
  - o Business Finland and Visit Finland

**Tourism Cooperation Group 2016–2018**

- working group of 35 industry leaders representing different branches of tourism and national trade and labour market associations in the hospitality and service industry
- The aim was to discuss about and set priorities for actions to enhance competitiveness of tourism industry, and communicate the priorities to the mid-term review of Government Programme (spring 2017) and next GP (2019-2022)
- Tasks
  1. to act as a tourism advisory board for MEAE
  2. to follow up and estimate the development of operational environment of and phenomenon of tourism at national and global level
  3. to discuss about issues related to the development of national tourism policy and legislation
  4. to set priorities for action to enhance competitiveness of tourism growth by utilizing existing choices and acts, and to propose new recommendations to MEAE / government
  5. to communicate the meaning of tourism industry
  6. to support the work of Visit Finland

**4.7. Please identify and describe any measures/actions in your country which contribute to maximising the potential of EU Funds, including Financial Instruments for developing tourism (e.g. information on main objectives, financing opportunities, training courses, etc.). (Max. 1000 characters)**

Different public and private organisations hold EU financing opportunities information events all over the country and inform regularly about the actualities in the newsletters and by using different kinds of information channels.

**4.8 Please describe shortly which EU programmes are used the most frequently and for what purposes of tourism development in your country. (Max. 1000 characters)**

European Regional Development Fund (ERDF)

European Social Fund (ESF)

European Agricultural Fund for Rural Development (EAFRD)

European Neighbourhood Instrument Cross-Border Cooperation (ENI CBC)

European Territorial Cooperation objective (ETC)

European Maritime and Fisheries Fund (EMFF)

Three main categories for targeting the content of EU funding are enterprise support projects, operational activities, and services that support tourism, including infrastructure. Examples of operational activities are marketing, product development, networking projects and research. Supporting services and infrastructural projects include development actions for natural sites and trails, cultural and sport destinations, events and transportation sector.



*Sustainable and responsible tourism, whether talking about economic, social or environmental sustainability, is a broad concept and may be interpreted in various ways depending on the attributes of a Member State or region.*

*The following questions focus on sustainability and responsibility in tourism as described in the 2007 Commission Communication<sup>2</sup> on an agenda for sustainable and competitive European tourism.*

**4.9. Sustainable destination: What support is given to strengthen destination management at the national /regional/local level (e.g. supportive policy environment, knowledge networks, training programmes, technological support tools, financial support, promotional activities, etc.)? (Max. 1000 characters)**

Nature has intrinsic value but is also invaluable to humans on a concrete level. Demand for ecosystem services will increase in line with population and economic growth, and improvements in material standards of living. The transition towards greener tourism is a long and challenging process. Energy saving and enhancing energy efficiency are often economically profitable. Good energy-related decisions mean good environmental decisions. Recycling of waste also facilitates considerable reductions in greenhouse gas emissions – but we can achieve even higher reductions by preventing wastage and the generation of waste. Cultural sustainability, in turn, is based on an awareness and appreciation of culture and cultural heritage. Local culture must remain vibrant and its special characteristics must be preserved. Culturally sustainable tourism is developed with an ear to locals and considering other local businesses. Culturally sustainable tourism strives to maintain local values. Consumer choices are crucial to determining what enterprises develop and consumers buy. Demand thus creates and modifies supply. As a cross-sectoral industry, tourism has the opportunity to influence the shift towards more sustainable, cleaner, lower-carbon economic growth. This calls for new, innovative solutions in terms of more ecological performance and the development of sustainable tourism products and experiences.

- Increasing communication and training on the importance of sustainability and responsibility and the increasing environmental and cultural awareness of customers as a competitive edge for Finland
- Increasing awareness and practical knowledge of adjusting to climate

Finland's Strategy for the Arctic Region was published in August 2013 and updated in 2016. In order to achieve growth and competitiveness in tourism industry, government policy regarding the priorities in the updated Arctic Strategy includes also a programme for sustainable tourism. See 4.10.

**4.10. Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of tourism businesses (e.g. supportive policy environment, knowledge networks, orientation of business support services to sustainability, training, financial incentives, promotional activities, etc.)? (Max. 1000 characters)**

Growing tourist flows are testing Finland's natural and cultural environments. Sustainable development practices must be attained by the daily activities of all tourism operators in order to ensure a sustainable development of the tourism industry and a profitable business in the future. Beside regional development projects funded from several sources, focusing on culturally responsible tourism or tourism carbon footprint calculation, the Tourism 4.0 funding enhances sustainability of tourism businesses by providing Sustainable Arctic Travel Destination programme for years 2018-2019. The program is implemented by Business Finland / Visit Finland.

**Sustainable Arctic Travel Destination Programme 2018–2019**

- The goals of the programme are to
  - develop sustainability of tourism destinations and businesses
  - promote Finland as a responsible tourism destination and country, and
  - to increase the number of overnights in sustainable tourism businesses.
- The measures of the programme include, e.g.
  - studies of practices of Finnish tourism businesses and international sales channels for sustainable travel services
  - communication campaigns for tourism businesses (to motivate businesses to adapt the responsible practices of doing business), tour operators (to inform about Finland as sustainable tourism destination) and travellers (to motivate and guide travellers to act responsibly)

<sup>2</sup> [http://ec.europa.eu/enterprise/sectors/tourism/documents/communications/commission-communication-2007/index\\_en.htm](http://ec.europa.eu/enterprise/sectors/tourism/documents/communications/commission-communication-2007/index_en.htm)

- creating and piloting a Sustainable Travel Finland label (e.g. approx. 780 companies have some kind of an (environmental) certification label now)
- organizing media trips to sustainable tourism destinations/businesses and small scale marketing campaigns with in social media.

**4.11. Responsible tourism: What support is given to tourists and the tourism industry to promote their responsible practices and choices** (e.g. awareness raising, sustainability in education, national marketing and media campaigns, promotion of certification schemes, etc.)? (Max. 1000 characters)

Please see 4.10

**4.12. Please describe maximum three of the most significant planned / future tourism measures (legislative or non-legislative) which envisage to impact travellers visiting your country from other Member States or from outside Europe.** (Max. 1000 characters)

Sustainable Travel Finland umbrella label

## **5. ADDITIONAL INFORMATION**

**5.1. Please describe maximum 3 best practices of tourism measures implemented at national, regional or local level** (any type of activity). (Max. 2000 characters)

Business Finland / Visit Finland promotes Finland as tourism destination with four distinct regions that include the Helsinki capital region, Lapland, Lakeland and the Archipelago. During the year 2018, cooperation at regional level has been reinforced and it has taken steps towards more strategic and long-term development in internationalising tourism regions, in terms of promotion and product development both.

An example of a good tourism co-operation is the Visit Arctic Europe project (I-II) where Finnish and Swedish Lapland and North Norway combine their tourism expertise. The aim of the Visit Arctic Europe project has been to develop this area into a cross-border, high-quality tourist area, which is an internationally competitive and well-known Arctic tourist destination.

**5.2. Please describe, in a concise manner, in your view, what policy developments / actions / activities would you expect from the Commission's tourism team that would serve better (than the current ones) the EU Member States and the industry.** (Max. 2000 characters)

VISA issues

Strengthen and unify statistical data gathering, tourism research and market research in EU

Best practices and benchmarking cases delivery

**THANK YOU**