

Interreg Central Baltic Project
***Boosting Tourism Business Growth through Higher
Professional Education***

Joint report of WP 1
***Identifying and Aligning the Skillset
Finland, Estonia, Latvia***

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Introduction

The development of tourism in the Baltic Sea region has become more international. At the same time, the region faces global competition which has to be responded to by the destinations. This requires skills development and similar professional skills in the tourism industry across the region. It is necessary to combine efforts to improve skills and to promote tourism education without borders in the region in order to maintain and to boost competitiveness of the region.

This study provides an example of skills development within the context of international tourism business. It is a part of the EU-funded project BOOSTED - Boosting Tourism Business Growth through Higher Professional Education (Interreg Central Baltic, 1.11.2016-31.10.2019). The purpose of the project is to identify a relevant skillset needed in the international tourism business development in Finland, Estonia and Latvia. The skills¹ are then translated into a joint curriculum which will be implemented as a professional higher education study programme online.

The aim of this specific research is to identify the relevant skills needed in international tourism business development in Finland, Estonia and Latvia. As a result national reports covering the CBR areas in Latvia, Estonia and Finland were elaborated by the project partners. This paper is a consolidated summary of the national reports. The first part of the study reviews the skills highlighted in the existing national and regional tourism related strategies as well as in the sector and project reports, higher education curricula in all three countries. The second part explores the perceptions of the tourism and hospitality industry by interviewing people in tourism-related organisations in Estonia, Finland and Latvia and we

Secondary data review

Developing the Baltic Sea region as a common tourism destination

Tourism already contributes significantly to the economy of the Baltic Sea region. Growth in the tourism industry has supported the economic recovery in the region. The number of international tourist arrivals around the Baltic Sea increased by almost 50 % since the millennium to more than 106 million in 2013. Arrivals for example from China, India and Russia have increased at a doubledigit rate. However, tourism in the Baltic Sea region will only be able to continue its growth in the long run, if

¹ The terminology of the concepts "knowledge", "skills" and "competences" is adopted following the recommendation of European Commission (2014)

Knowledge - means the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices that is related to a field of work or study. In the context of the European Qualifications Framework, knowledge is described as theoretical and/or factual;

Skills - means the ability to apply knowledge and use know-how to complete tasks and solve problems. In the context of the European Qualifications Framework, skills are described as cognitive (involving the use of logical, intuitive and creative thinking) or practical (involving manual dexterity and the use of methods, materials, tools and instruments);

Competence - means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development. In the context of the European Qualifications Framework, competence is described in terms of responsibility and autonomy.

Source: European Commission 2014. ESCOpedia. European Skills, competences, qualifications and occupations.

Retrieved from <https://ec.europa.eu/esco/portal/escopedia/Knowledge>



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the efforts will be oriented to international markets and marketing will be coordinated accordingly. (European Commission, 2015; Baltic Sea Tourism Forum, 2015.)

The Action Plan of the Baltic Sea Strategy (European Commission, 2015) stresses that tourism in the Baltic Sea region is still fragmented and non-cooperative. There are various reasons for this. First, the development of the tourism industry and cooperation is at different levels in the region, which results in an asymmetric readiness to cooperate at transnational level. The development of a globally competitive tourism scene in the Baltic Sea region also depends on close cooperation with other sectors. The development of globally competitive and sustainable tourism also depends on close cooperation with the ICT and health sector. (European Commission, 2015)

Figure 1: The Central Baltic programme regions (The Central Baltic Programme 2014-2020)

Several national development strategies and plans in Finland, Estonia and Latvia contribute to the tourism development. The following national planning documents were overviewed:

1. Sustainable Development Strategy of Latvia until 2030 (LV2030);
2. National Development Plan of Latvia 2014 – 2020;
3. Latvian Tourism Development Guidelines 2014-2020;
4. Estonian National Strategy on Sustainable Development “Sustainable Estonia 21”;
5. National Reform Program “Estonia 2020”;
6. “Estonia 2020” Action Plan 2015-2020;
7. Estonian National Tourism Development Plan 2014 – 2020;
8. Enterprise Estonia Strategy for 2015 – 2018;
9. Achieving more together – the Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025.

Also the strategy of Visit Finland and tourism related national level reports by the Finnish Ministry of Economic Affairs and Employment were included in the overview. Several regional strategies were also taken into consideration: Satakunta Regional Tourism Strategy as well as sustainable development strategies of Vidzeme, Zemgale, Kurzeme and Riga planning regions in Latvia, which are elaborated in line with the national level strategic planning documents.

Besides the above mentioned, indirect impact on tourism can be identified in several national planning documents related to the entrepreneurship, education, ICT and other areas of national development.

The strategies are based on **sustainable management and development** of various tourism resources. Much attention is paid to nature and cultural tourism, also maritime, wellness, health and MICE tourism are promoted as strong specialties. **Cooperation and regional development** are topical strategic priorities. Much attention is paid to competitive, innovative, high quality **product development and destination management and marketing**. Modern approaches in **marketing communication and sales** are stated as very important. Summary of the development priorities is provided in Annex 1.

The national development strategies indicate areas of human resource development to achieve the strategic goals via strong emphasis on entrepreneurship, innovativeness, flexibility and willingness for life-long learning to acquire skills and competencies needed for development of competitive society of welfare. Strategic planning documents emphasize that education providers should cooperate with the industry. The lack of cooperation and networking seem to be an underdeveloped skill. Strategic planning documents define the need to increase the amount of training and “hands - on” approach in study programmes.

Strong marketing and promotion skills with good knowledge of target markets, entrepreneurship skills and innovative product design using contemporary IT solutions, networking and communication are among the core competencies expected through collaborative efforts between enterprises and educational institutions.

Review of previous studies in the CBR related to tourism competencies

There are list of industry reports and previous research at some extent related to the topic in all three partner countries. The following studies (mostly implemented in the last three years) were overviewed:

1. The Study of High Priority Tourism Markets, Latvia (2016)
2. Consumer Behaviour of Foreign Tourists in Riga (2014)
3. Tourism Service Quality in Latvia: “Q- Latvia” and “Riverways” (2014)
4. The Report of the Erasmus Multilateral Project “Joint Masters in International Tourism and Event Management”/ ITEM, Latvia (2012-2014)
5. Reviews on Tourism Markets, Latvia (2016)
6. Conformity of the Education Supply in Valmiera and Vidzeme with the Demand of Entrepreneurs and Employment Trends, Latvia (2016)
7. Cooperation Between Rural Tourism Sector and Tourism Education Field - Current Situation and Future Development Analysis, Estonia (2014)
8. Tallinn Visitor Survey 2008-2014 Summary Report. Revised version.
9. Event Tourism Sector Overview, Estonia (2016)
10. Tourism Attractions Sector Overview, Estonia (2016)
11. Nature-based tourism opportunities in Estonia (2008)
12. Memo of minutes from the roundtable discussion about tourism education competency needs, Estonia (2012)
13. Foresight of professional skills and competencies needed in the tourism and restaurant industry, Finland (2012)
14. Service Industry in 2020, Finland (2006)

The review of existing studies related to competencies in the tourism sector highlight some major areas of concern. Several studies indicate weak marketing and promotional skills, especially internationally. Lack of knowledge of viable markets and their needs does not allow further development of competitive tourism products. Customer know-how and information on segment level should be enhanced related to international markets. In addition, skills of how to productise, market and sell the products to international markets as well as how to serve international guests are needed.

Previous studies suggest that there is still place for improvements of communication skills, including inter-personal, cross-cultural and digital communication. Also foreign languages are stressed in several studies as important and still underdeveloped skill.

Contemporary ICT solutions are vital in tourism product design and marketing (promotion), thus related skills are highly required. The products and destinations should have good visibility. The skills in increasing the effectiveness of marketing activities and making the travel services easier to find and buy are needed.

Insufficient selling skills are significant weakness and should also be strengthened according to the previous studies.

Limited knowledge of resources the tourism product is based on, lack of creativity in product development, and insufficient cooperation weaken the competitiveness of individual entrepreneurs and/or the whole destination. Reviews of previous studies lead to conclusion that cooperation and networking skills need more emphasis in the future.

Strong product development stems from a creative approach to available resources, and good knowledge of desired experiences. Competitive and creative product design is based on research and feedback, thus these competencies should not be overlooked. As indicated by the studies reviewed, many entrepreneurs in the tourism sector do not use research sufficiently or ignore its' importance.

Also skills related to profitability and increasing tourism revenue have importance. In addition, sustainable tourism and responsible practices, entrepreneurial and foresight skills are needed.

In conclusion the indicated areas for the competence development in tourism sector can be grouped as follows: **Product development; Communication; (Digital) marketing and sales; Collaboration and networks; Internationalisation; Managing business operations.**

Tourism related higher education curricula in the CBR

In total 17 tourism related bachelor level study programmes were analysed (see Annex 2) in Finland (7), Estonia (3) Latvia (7). The following competences and skills are represented in most of the curricula of analysed programmes: **1) general understanding of the tourism and hospitality industry, 2) tourism and hospitality marketing skills, 3) tourism and hospitality management skills, 4) strategic planning skills, 5) communication skills, 6) skills in using IT.**

In general the tourism study programmes can be characterized as similar and even standardized. Also many programmes can be characterised as being rather reactive instead of being pro-active. They might be in line with the needs of the labour market, but do not forecast and prepare the professionals for the future needs.

If compared to the study programmes offered in Latvia and Estonia, in Finland there is a stronger emphasis on **experience design, networking and sales skills**, which are indicated as highly important both in the strategic planning documents and some of the studies described in the previous chapters.

Communication related study courses are well represented in most of the analysed bachelor study programmes. Also employers give positive feedback regarding student communication skills;

however, previous studies suggest that there is still place for improvements of communication skills. It might be an indication that the employers are not fully aware of the role of communication skills (including cross-cultural communication) in tourism.

Strategic planning documents define the need to increase the amount of **training and “hands – on” approach** in the study programmes and analysis confirms that internship takes proportionally significant position in the bachelor level tourism education.

In the analysis of the post-internship feedbacks in Vidzeme University of Applied Sciences and Satakunta University of Applied Sciences the following skills were highlighted: language skills, communication skills, skills related to customer relations, marketing and sales skills, collaboration skills, stress management. In some feedbacks insufficient knowledge of Russian language was pointed out illustrating the importance of it in the BSR. Several entrepreneurs mentioned that students are afraid of making mistakes, which leads to think about the improvement of decision making skills and increasing self confidence of young professionals.

Methods and results of interview analysis

Description of research methodology

The primary data were collected by using semi-structured individual and group interviews, and focus group discussion (FGD). The interviews and FGD with representatives of tourism industry were held from February 2017 – April 2017. The informants were selected on the bases of the location of organization in tourism destination and represented functions in tourism (see below Table 1. and Figure 2.)

Table 1. Selection criteria of informants on the basis of organizational functions

Type of organizations	Represented functions
Tourism agencies and operators	Small and medium size private enterprises working with local, incoming and outgoing tourists
Coordination organizations	Regional tourism associations Associations of different tourism types and tourism professionals Representatives of tourism clusters
Hospitality enterprises	Small and medium size private tourist accommodation Small and medium size catering enterprises
Tourism information centres / tourism developers	Tourism information centres, points etc. Municipal departments and/or municipal agencies responsible for tourism development
Tourist attractions	Museums and other heritage based tourist attractions Nature based tourist attractions, e.g. departments responsible for the recreation in national parks, nature parks Other tourist attractions such as theme parks, science centres etc. Manufacturers offering excursions
Other informants	Other informants defined by the local specifics Tourism organizations offering wide range of services

The informants were selected from all the sectors – NGO, private sector, state and municipality – thematically representing different fields in tourism industry as hospitality business, destination marketing, tourist sites etc. (See Figure 2.)

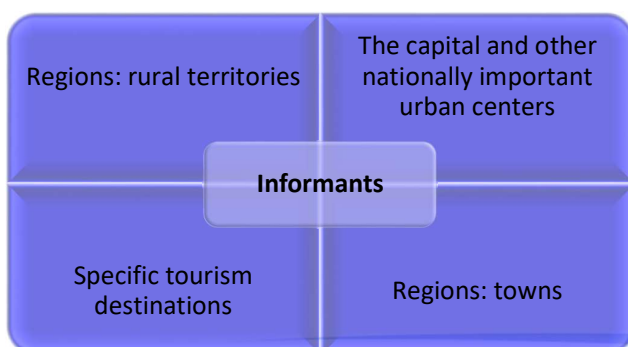


Figure 2. Selection of informants on the basis of tourism destination

The questions of semi-structured interviews were adopted regarding the profile of informant and extra questions were added if new areas of concern emerged. The questions included the following main themes:

- Personal information of informants referring to a position and / or ownership; years of professional experience in tourism, and educational background;
- The most meaningful factors in choosing an employee;

- Competences personally needed to improve (or acquire) to foster the development of one's organization;
- Staff training and lifelong learning activities;
- The strengths and challenges of a region as the tourism destination.

In total 103 interviews were conducted (Finland n= 32; Latvia n= 44; Estonia – 27). Some of the informants represented several sectors, e.g. the head of a tourist information centre is also the owner of rural tourist accommodation at the same time. In each partner country the system of tourism organisation differs so it is more important to classify informants by their functions than by sector. The interviews were held until data reached the point of saturation.

Mainly data were collected during face to face interviews by visiting informants in their organizations or meeting them in tourism fairs, board meetings of regional and professional tourism associations. A few interviews were conducted via skype, phone or e-mail. The average duration of interviews was from 30 minutes till 2 hours.

The qualitative content analysis was the main method of data analysis along with frequency count to identify significance of needed skills. Areas for the competence development (product development; communication; marketing and sales; collaboration and networks; internationalisation; managing business operations) in tourism sector identified in the strategic documents and previous studies were used as the basis of the initial data coding scheme. After the first round of coding, categories of skills were re-defined according to the new themes emerging from interview data:

- Cultural awareness and internationalisation
- Multichannel sales and marketing communication
- Product development
- Managing business operations
- Multisectorality and collaboration

To reflect national differences, researchers added some other categories of themes (mostly in case of Latvia and Estonia); however, data identified rather similar skillset of needs among countries.

- Digitalization
- Languages
- Personal traits
- Customer service
- Specific knowledge for industry

Results of interviews

As mentioned above, there were more common needs of tourism industry than differences. Informants stressed the observed problems that affect and would affect in the future the efficiency of performance of their organizations – starting from personal traits of staff members, their functional illiteracy, inadequate self-esteem and misperception of tourism industry ending up with the lack of strategic vision. The summary of each skills category will be provided here (see the complete list of identified skillset in Annex 3):

The skills under the category of **cultural awareness and internationalisation** were often mentioned by informants from all sectors (municipal and state, private, NGO) in the context of present and future needs. The category reflects challenges of internationalisation of tourism market as national tourism development strategies have defined Far East markets as the priority.

Informants mentioned the need to identify and reach diverse international target groups by using a coherent message to promote competitiveness of tourism destination. Improving hospitality skills based on cultural awareness: understanding special characteristics of different cultures and their sensitivity to product offerings (e.g. safety and security; sustainable products etc. should be used in promotion); language skills (serving the customer in one's own language helps meet and exceed the expectations of the guest), as well as knowledge of the market and customer profiles (especially of Asian tourism markets). Although cultural awareness and internationalization related subjects are well covered in higher education curricula, the significance of the skillset in contemporary tourism business claims these skills should be strengthened.

The skills under the category **multichannel sales and marketing communication** were frequently mentioned by informants in all three countries and in all sectors, specifically in the context of the future needs. The use of digital channels is mentioned as priority – the trends of the digitalization and future technologies define the tourism business and make it global. IT knowledge in marketing is critical to make tourism products visible and sell them via online channels. A wide scope of IT related skills (starting with social media usage skills and ending up with creative design) should be strengthened among tourism students and tourism professionals of all age groups. Online visibility is deemed important (well designed, interactive websites, active social media accounts, useful mobile applications).

Informants in all partner countries stress the lack of sales skills. By 'sales skills' is understood a proactive, goal oriented approach of staff to increase offline and online sales. It includes predicting and understanding the behavior of customers, offering and presenting products in a sophisticated manner. Insufficient skills of sales is identified in previous studies, however, in some curricula of higher education it is poorly covered.

Other needs of tourism industry are related to better understanding the travel purchasing and selling processes (from the perspective of customers, suppliers and intermediaries), establishment of optimal systems how to search online for travel products and how to sell (multitude of thematic domestic and international sales channels and models), developing digital services and a multichannel customer experience by using user-oriented approach.

The main challenges related to the category **product and experience design and development** were associated with creating unique, authentic and innovative tourism product and experience design without losing connection to local values and both tangible and intangible heritage (e.g. local food, storytelling) and is based on natural environment.

The informants frequently stress the significance of high quality, well packed products for specific segments that exceed customers' expectations, tailoring and adjusting products to different needs. Designing and developing customer-oriented products and experiences by using service design methods is mentioned frequently. A high number of informants considered sustainability as a key value of product and experience development.

As seasonality is one of the key impact factors of tourism industry in the Central Baltic Sea region and many informants stressed the role of tourism offer development in off season or low season.

At the same time in this category the broader view is necessary in order to identify the business opportunities of the multisectoral business environment, developing competitive and versatile offerings from the interfaces of tourism and other fields.

Although the **business management operations** are well covered in curricula of tourism study programs in CBR, many representatives of tourism industry claim that entrepreneurial competence - how to run a profitable business and increase competitiveness of enterprise in a certain operational environment - should be strengthened. Frequently informants expressed their concerns of organizational skills, management of team, and human resource management (specifically in the context of younger staff members), financial competences, and marketing skills (including basic principles of product pricing) of trainees and postgraduates. Some of the informants stressed the need to intensified usage of digital technologies in business operations.

Importance of entrepreneurial attitude is frequently mentioned in the context of leadership, visionarism, and how to be an inspirational and encouraging team leader. Commonly leadership skills are combined with basic business literacy skills – quality, accuracy and speed in communication.

Significant strategic competence is ability to identify the changes of tourism business environment (global, local) and interpret them, to develop analytical foresight skills and awareness of trends, to understand tourism as a system (“big picture”), also to identify and evaluate the factors of a profitable tourism business, to understand the impact of consumers on business operations and processes, business sustainability.

The role of collaboration is undisputable in the bid to reach international customers and to attract more tourists by offering joint products. It explains the significance of needed skills defined as **multisectorality, collaboration and networks**. However, informants claim there are not sufficient skills and knowledge of the collaboration models, networking, e.g. in the destination marketing. However, informants gave conflicting results when they commented on the practical implications of the collaboration and networks. On the one hand, opportunities for networking were seen as satisfactory or good in general. On the other hand, real life practices appear to be less satisfactory (few cases are exceptional). It was obvious that there is a need to establish new collaboration models and multisectoral co-operation and to strengthen rational understanding of how to utilize strategic partnerships and cluster networks in tourism business development.

Other specific needs mentioned by the informants were networking and creation of networks to enhance collaborative product development, sales and marketing activities to reach certain segments and markets jointly, to strengthen theme-based collaboration and networks of tourism related enterprises, sales and marketing organisations, and to recognize value chains and value networks. Shortage of cross-sectoral understanding was mentioned as a significant weakness, and it should be solved through improved communication and organizational skills.

Wider scale (The Baltic Sea region) cooperation and collaboration was often mentioned as a way how to increase competitiveness and visitation for each country, especially from Asian, American, and Southern European markets; however, not everybody has this broader perspective and some entrepreneurs see their business in a rather isolated manner.

There are 3 common categories of needs emerging from Estonian and Latvian interview data. The most frequently mentioned are **personal traits**. The informants stressed the need to display a welcoming attitude, hospitality, openness, a sense of empathy, civility, accuracy, and diplomacy

(communication skills). These are important in developing good leadership and management skills. Additionally, the customer in the 21st century is experienced and demanding, which means a higher need for psychological resilience, conflict management and stress management skills.

Another category is **digitalization** (in Estonia mentioned mainly by informants from the private sector, in Latvia – by all sectors) – from understanding the concepts to the usage of specific tools. Digitalization-related needs are frequently mentioned in relation to marketing as well as competitive and unique product design (described even as ‘crazy’ innovative products).

The third category of needs is defined as **professionalism**. In the Estonian case, it is interpreted as a balanced combination of practical experience and theoretical knowledge that increases understanding of tourism industry. It also refers to the list of cognitive skills such as independent and critical thinking, creativity and ability to make well rounded decisions based on research. In the Latvian case, informants delivered critique referring to the poor knowledge of trainees and postgraduates in **specific subjects** significant to work in any sector of tourism industry – geography, history, history of art and culture, and contemporary culture.

Both Estonian and Latvian informants refer to **language skills** as a highly important issue. All Latvian informants stressed the Russian language as the biggest problem – it disappears from the toolbox of the young employees but is highly needed and demanded in tourism business as the Russian speaking market is wide and geographically placed in the neighbourhood. Each person in tourism should know at least 2 foreign languages at an advanced level. Other often mentioned languages are English, German, while others depend more on the geographical locations of tourism destination.

Conclusions

The aim of this research is to identify the relevant skills needed in international tourism business development in the Baltic Sea Region countries - Finland, Estonia and Latvia. The analysis of the tourism related national and regional strategies, former reports and studies, as well as the review of higher education curricula of tourism study programmes and informants – representatives of tourism and hospitality industry – have highlighted the most topical issues of skillset in developing tourism business in Finland, Estonia and Latvia.

Both tourism-related strategies and previous studies indicate the significance of innovative, good quality tourism products, cooperation and networking in destination development, promotion and sales, communication and IT competences. While the current study programmes might formally be in line with the above mentioned needs, the former studies still indicate gaps and areas for improvement. The link between the content of tourism study programmes and the needs of labour market should be strengthened and the cooperation between the HEIs and entrepreneurs systematically and actively maintained.

These findings are confirmed by the representatives of tourism industry in the BSR as they frequently refer to insufficient skills how to create innovative tourism products and experience design, a wide spectrum of rather poor managerial and sales skills. They emphasize the need to follow the trends and strengthen the skillset needed to perform and measure effective social media marketing activities. Many informants agree that a lack of cooperation and networking hinders the development of tourism in the BSR. Unsurprisingly in the context of global development processes, there is also a need to strengthen tourism related ICT skills and communication competences, including cross-cultural

communication. Last but not least, relationship management between customers of organizations is getting more significant as competition is growing and customers' behaviour is changing.

Another set of recommendations concerns teaching methods. Universities have received criticism from informants for applying a rather standardized teaching approach. It suggests that higher education curricula should involve more innovative and creative teaching methods to foster the growth of students' personality. Many informants also recommended that the balance between theory and practice in tourism study programmes be re-assessed, with an emphasis on a hands-on approach. Summarizing the opinions of informants representing small and medium size tourism organizations, the industry needs rather universally trained professionals able to react to challenges of the fast-changing tourism business environment, and cognitively capable professionals with multitasking skills.

Research results claim that Estonian, Finnish and Latvian tourism sectors face rather similar problems in terms of skillsets; however, it also presents some differences such as diverse perceptions of Baltic countries or the Baltic Sea Region as a tourism destination.

The recited quote from the report "Identifying and Aligning the Skillset Analysis of Secondary Data – Estonia (Raadik Cottrell 2017) provides the essence of skillset transformations *"Tourism enterprises seek personnel with higher education attitude and vocational education skills"*.

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Annex 1

Table 1. Summary of the Strategic Tourism Development Priorities in the Central Baltic Region

Development Priorities	References in the Planning Documents
Nature Tourism	<p>Sustainable Development Strategy of Latvia until 2030: sustainable management of nature values and services.</p> <p>National Development Plan of Latvia 2014 – 2020: strategic objective “Sustainable Management of Natural and Cultural Capital”.</p> <p>Latvian Tourism Development Guidelines 2014-2020: nature tourism is one of the strategic types of tourism.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: nature-based tourism as one of the focuses.</p> <p>Operational and Qualitative Goals of Nature Tourism in Finland: large tourism and accommodation companies actively offer and sell nature tourism products; small accommodation businesses make use of the surrounding nature by turning it into tourism products; business clusters with joint sales and marketing organisations are formed around national parks and in urban environments; natural attractions and routes in all of Finland are turned into products according to consistent criteria, both to be offered directly to individual visitors and to be utilized by the tourism industry; nature tourism products and destinations have good visibility on all levels of communication; the products are accessible and easy to book via domestic and international distribution channels; turnovers and numbers of customers grow in micro and SME businesses; nature tourism businesses operate in a sustainable manner aiming at a small carbon footprint and applying new innovations in developing their enterprise.</p>
Maritime Tourism	<p>Estonian National Tourism Development Plan 2014 – 2020: maritime tourism as one of the focuses.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: one of the strategic projects is making the Finnish archipelago internationally known.</p>
Cultural Tourism	<p>Sustainable Development Strategy of Latvia until 2030: preserving cultural space.</p> <p>National development plan of Latvia 2014 – 2020: strategic objective “Sustainable Management of Natural and Cultural Capital”.</p> <p>Latvian Tourism Development Guidelines 2014-2020: cultural tourism is one of the strategic types of tourism.</p> <p>Estonian National Strategy on Sustainable Development “Sustainable Estonia 21”: viability of the Estonian cultural space.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: cultural tourism as one of the focuses.</p>
Creative Tourism	<p>Sustainable Development Strategy of Latvia until 2030: development of creative society.</p>

	<p>Latvian Tourism Development Guidelines 2014-2020: creative tourism is one of the strategic types of tourism.</p>
Culinary Tourism	<p>Estonian National Tourism Development Plan 2014 – 2020: culinary tourism as one of the focuses.</p>
Wellness and Health Tourism	<p>Latvian Tourism Development Guidelines 2014-2020: health tourism is one of the strategic types of tourism.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: health tourism as one of the focuses.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: one of the strategic projects is Finrelax – Turning Finland into a top country of wellness tourism.</p>
Sport Tourism	<p>Estonian National Tourism Development Plan 2014 – 2020: sport tourism as one of the focuses.</p>
Family Tourism	<p>Estonian National Tourism Development Plan 2014 – 2020: family tourism as one of the focuses.</p>
MICE Tourism	<p>Latvian Tourism Development Guidelines 2014-2020: MICE tourism is one of the strategic types of tourism.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: business and conference tourism as one of the focuses.</p>
Sustainability	<p>Sustainable Development Strategy of Latvia until 2030: sustainable management of nature values and services.</p> <p>National development plan of Latvia 2014 – 2020: strategic objective “Sustainable Management of Natural and Cultural Capital”.</p> <p>Sustainable development strategies of Vidzeme, Zemgale, Kurzeme and Riga planning regions: common focus in tourism development is on optimal usage of resources and balanced development of tourism.</p> <p>Latvian Tourism Development Guidelines 2014-2020: the aim is sustainable development of Latvian tourism industry by increasing the competitiveness of Latvian tourism products in foreign markets.</p> <p>Estonian National Strategy on Sustainable Development “Sustainable Estonia 21”: ecological balance – including sustainable development.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: the focus of the plan is on sustainable tourism development and stronger sustainability of existing systems and profitability.</p> <p>Enterprise Estonia Strategy for 2015 – 2018: one of the goals of the tourism awareness and training program is to introduce the principles of sustainable tourism to a wider public.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: one of the strategic focus areas is a competitive operational environment for tourism that supports growth and renewal. Sustainable tourism as one of the key pillars supporting success.</p>

Cooperation & Regional Development	<p>Sustainable Development Strategy of Latvia until 2030: cluster program, perspective of spatial development.</p> <p>Latvian Tourism Development Guidelines 2014-2020: stimulation of regional tourism clusters and inclusion of tourism products of Latvia in common offer of the Baltic States.</p> <p>Estonian National Strategy on Sustainable Development “Sustainable Estonia 21”: coherent society – including balanced regional development.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: development of regional tourism destinations and products as one of the main strategic goals. More active cooperation between state, regions, companies and local destinations in marketing activities.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: one of the strategic focus areas is 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. New collaboration models as one of the key pillars supporting success.</p> <p>Satakunta Regional Tourism Strategy: multisectoral cooperation as one of the key themes.</p>
Innovation	<p>Sustainable Development Strategy of Latvia until 2030: innovative and eco-effective economics.</p> <p>Latvian Tourism Development Guidelines 2014-2020: support for innovative, higher added value tourism product development, including infrastructure.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: innovativeness is one of the key words in the tourism development vision.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: the vision is that innovative customer-oriented solutions in marketing and sales as well as digital solutions will have increased the intensity of travellers’ experiences and improved profitability.</p>
Creativity	<p>Sustainable Development Strategy of Latvia until 2030: development of creative society.</p>
Product Development	<p>National development plan of Latvia 2014 – 2020: an indicator for measuring achievement of the strategic objective “Sustainable Management of Natural and Cultural Capital” is the creation of export-oriented tourism products by taking advantage of the unique nature and the cultural and historical heritage of the regions, the infrastructure in place in the regions and the potential of resort services.</p> <p>Latvian Tourism Development Guidelines 2014-2020: the aim is sustainable development of Latvian tourism industry by increasing the competitiveness of Latvian tourism products in foreign markets. Stimulation of highly competitive tourism product development.</p> <p>Estonian National Strategy on Sustainable Development “Sustainable Estonia 21”: growth of welfare – including the diversity of operations and consumption (recreation) options.</p>

	<p>“Estonia 2020” Action Plan 2015-2020: facilitate the development of services by service sector enterprises (e.g. service design).</p> <p>Estonian National Tourism Development Plan 2014 – 2020: the main strategic goals are –increasing the awareness of Estonia as a travel destination and competitive tourism product development; development of tourism attractions and events of international interest; development of regional tourism destinations and products.</p> <p>Enterprise Estonia Strategy for 2015 – 2018: Estonian tourism products and services are internationally competitive. Estonian tourist attractions and events are internationally appealing.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: one of the strategic focus areas is 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. Also developing competitive and versatile offerings from the interfaces of tourism and other fields is in focus.</p> <p>Visit Finland strategy: one of the core missions specified in Visit Finland’s strategy is the development of the demand-oriented products and services offered. In practice, Visit Finland’s goal is to make sure that the products and services encountered by visitors when in Finland meet their expectations and level of requirements.</p> <p>Satakunta Regional Tourism Strategy: product development as one of the key themes.</p>
Quality	<p>Latvian Tourism Development Guidelines 2014-2020: increase of quality of tourism products (legislation, support for suppliers and consumers).</p> <p>Estonian National Tourism Development Plan 2014 – 2020: quality visitor experiences as the key words in the tourism development vision.</p> <p>Enterprise Estonia Strategy for 2015 – 2018: one of the goals of the tourism awareness and training program is to increase the awareness of tourism entrepreneurs of the quality management of tourism products and services.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: quality management as one of the key pillars supporting success.</p>
Destination Management	<p>Latvian Tourism Development Guidelines 2014-2020: ensuring of recognition of Latvia as a tourism destination internationally by using modern channels of communication.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: the purpose of the National Tourism Development Plan is to ensure attractiveness and competitiveness of Estonia as a tourism destination.</p> <p>Enterprise Estonia Strategy for 2015 – 2018: Estonia is known as a travel destination.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: one of the strategic projects is Finland Stopover – making Finland a leading stopover country.</p>

<p>Marketing Communication & Sales</p>	<p>Latvian Tourism Development Guidelines 2014-2020: ensuring of recognition of Latvia as a tourism destination internationally by using modern channels of communication.</p> <p>“Estonia 2020” Action Plan 2015-2020: increasing skills and raising awareness of entrepreneurs, and stimulating investments in e-business and e-commerce solutions.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: new channels for introducing Estonia as a travel destination. More active cooperation between state, regions, companies and local destinations in marketing activities.</p> <p>Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025: one of the strategic focus areas is 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. Also increasing the effectiveness of marketing activities and making the travel services offering easier to buy is in focus. One of the strategic project areas is making tourism services easy to find and buy digitally.</p> <p>Satakunta Regional Tourism Strategy: visibility, content marketing and sales as the key themes.</p>
<p>Target Markets</p>	<p>Latvian Tourism Development Guidelines 2014-2020: the USA, China, Japan and India are listed as the most perspective far markets.</p> <p>Estonian National Tourism Development Plan 2014 – 2020: new strategies for activities in Asia; family tourism as one of directions.</p> <p>Enterprise Estonia Strategy for 2015 – 2018: Tourism marketing is primarily aimed at the end users of the ten biggest target markets that include tourists from Finland, Russia, Latvia, Sweden, Norway, Germany, United Kingdom, China, Japan, and the US.</p> <p>Visit Finland strategy: the largest markets are the neighbouring countries–Russia and Sweden, followed by Germany, the UK and France. In addition, the overnight stays from China, Honk Kong and japan are increasing very fast, which also poses new skill requirements.</p>
<p>Lifelong Education</p>	<p>Sustainable Development Strategy of Latvia until 2030: qualitative and accessible lifelong education.</p> <p>Sustainable development strategies of Vidzeme, Zemgale, Kurzeme and Riga planning regions: harmonization of educational content with real needs of economy, employers as well as lifelong learning approach.</p> <p>Latvian Tourism Development Guidelines 2014-2020: education of entrepreneurs about cooperation and cluster development, stimulation of cooperation among industry and education providers, sector sensitive professional education programme and profession standard development.</p> <p>National Reform Program “Estonia 2020”: adjustment of education needs to current needs of labor market; increase number of individuals active in the labor market with vocational and higher education degree(s); increase the internationalization of higher education.</p>

“Estonia 2020” Action Plan 2015-2020: developing a competence-based system of forecasting labor needs; more active involvement of entrepreneurs in the development of training objectives and definition of learning outcomes.

Estonian National Tourism Development Plan 2014 – 2020: promotion of tourism education and competencies as one of the focuses.

Enterprise Estonia Strategy for 2015 – 2018: one of the goals of the tourism awareness and training program is to expand the training opportunities of the tourism sector in the fields these are limited to.

Annex 2

Table 1. The list of tourism related bachelor degree programmes in the CBR

Institution	Education in Tourism
Vidzeme University of Applied Sciences, Latvia	Professional Bachelor Programme "Tourism Organisation and Management" Professional Bachelor Programme "Tourist Guide – Travel and Event Manager"
Latvia University of Agriculture	Professional Bachelor Programme "Catering and Hotel Management"
Liepaja University, Latvia	Professional Bachelor Programme "Tourism management and recreation"
Turiba University, Latvia	Professional Bachelor Programme " <i>Tourism and Hospitality Management</i> "
Baltic International Academy, Latvia	Professional Bachelor Programme "Tourism Management and Hospitality Business"
ISMA University, Latvia	Professional Bachelor Programme "Business Administration in Tourism"
University of Tartu Pärnu College	Applied degree program in Tourism and Hotel Management
Tallinn University of Technology Kuressaare College*	Applied degree program in Tourism and Catering Management
Estonian Entrepreneurship University of Applied Sciences	Applied degree program in Tourism and Restaurant Entrepreneurship
Satakunta University of Applied Sciences	Degree Programme in Tourism, Hospitality and Experience Management
Laurea University of Applied Sciences	Degree Programme in Tourism and Hospitality
Haaga-Helia University of Applied Sciences	Degree Programme in Tourism Degree Programme in Experience and Wellness Management Degree Programme in Hospitality, Tourism and Experience management
Saimaa University of Applied Sciences	Degree Programme in Tourism and Hospitality Management
Lahti University of Applied Sciences	Degree Programme in Tourism and Hospitality Business Management

*Current program admissions will be discontinued from fall 2017. The new program in Small Business Entrepreneurship and Experience Economy is currently under approval and will be offered under Estonian Maritime Academy Kuressaare Center starting from fall 2017.

Annex 3

Table 1. Finland: Relevant skills in international tourism business development

Category	Content
Product and experience design and development	<ul style="list-style-type: none"> • Applying customer and market information in product development • Designing and offering well packaged high-quality products and experiences that exceed the customers' expectations • Identifying the business opportunities of the multisectoral business environment, developing competitive and versatile offerings from the interfaces of tourism and the other fields • Strengthening knowledge of natural resources, wellbeing benefits of the natural environment and local food for product development purposes • Differentiation of products to customer segments, tailoring and adjusting products to different needs and reasons to visit for domestic and international tourists • Designing and developing customer-oriented products and experiences with service design methods • Managing customer experience
Multichannel sales and marketing communication	<ul style="list-style-type: none"> • Understanding the travel purchasing and selling processes as seen by buyers, suppliers and intermediaries • Making finding and buying travel products easy by identifying, understanding and developing the multitude of thematic domestic and international sales channels and models • Enhancing the visibility of destinations in digital sales channels • Utilizing the tools and possibilities of digitalisation in sales and marketing: digital sales channels, mobile technology, social media • Developing digital services and a multichannel customer experience by using user-oriented methods • Selling tourism services with a proactive and goal-oriented approach off and online • Improving sales skills: prospecting, contacting potential customers, offering and presenting products • Being aware of the trends of the digitalisation and future technologies in global tourism business
Collaboration and networks	<ul style="list-style-type: none"> • Building networks to enhance collaborative product development, sales and marketing activities to reach jointly certain segments and markets • Establishing new collaboration models and multisectoral co-operation • Strengthening the theme-based collaboration of networks of tourism related enterprises, sales and marketing organisations • Recognizing value chains and value networks and utilizing strategic partnerships and cluster networks in tourism business development
Internationalisation	<ul style="list-style-type: none"> • Identifying and reaching various international target groups • Enhancing customer know-how and information on segment level as well as market knowledge and customer profiles, especially on Asian target markets • Improving international customer service skills: understanding the special characteristics of different cultures as well as Finnish culture • Providing customer service that meets the needs of the international customer base • Serving the customer in their own language
Managing business operations	<ul style="list-style-type: none"> • Identifying and evaluating the factors of a profitable tourism business • Applying different revenue models

	<ul style="list-style-type: none"> • Understanding the key pricing factors • Determining the rate for the product • Adopting customer orientation and its increasing impact on business, developing customer-oriented and profitable business operations and business processes • Understanding and utilising the possibilities of digital technologies in business operations • Understanding the issues of sustainability • Identifying the operating environment with all its sectors and actors • Interpreting the global, operating environment of the tourism sector and identifying the changes in it • Developing foresight skills and awareness of trends • Developing an entrepreneurial attitude
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Table 2. Latvia: Relevant skills in international tourism business development

Category	Content
Cultural awareness/ internationalisation	<ul style="list-style-type: none"> • Developing marketing materials in different languages • Strengthening intercultural competences and cross-cultural knowledge • Developing knowledge of how to work in Far East markets • Understanding issues of safety (e.g. in leisure activities) in different cultures
Multichannel sales and marketing communication	<ul style="list-style-type: none"> • Understanding the management of customer feedback • Strengthening the competences of public speech (especially for sales and PR activities) and presentation in general, written communication, communication to media, face to face communication • Strengthening communication skills on social media and measuring the efficiency of social media as a marketing research tool • Strengthening media literacy and information literacy • Understanding the basic principles of marketing (along with the specifics of product, scope and size) and international marketing (e.g. reaching different markets) • Increasing know-how in introducing new products into the market • Recognizing the significance of applied research and improving marketing research skills • Understanding the needs of target groups • Improving sales skills in general and online sales in particular • Strengthening the competence of how to develop product design on the basis of customer experience • Developing competences to master audiovisual communication – to prepare (in terms of both technical skills and creativity) and evaluate audiovisual content, recognizing the role of high quality audiovisual content in tourism marketing
Product development	<ul style="list-style-type: none"> • Understanding the principles of experience design in product development • Understanding the role of quality and producing quality management • Identifying tourism resources and implementing resource management • Creating original content and products in line with the specific context of the place and local tradition • Reinforcing creativity and originality as well as innovation ability in any aspect of product development • Applying high quality interpretation • Identifying specific tourism niches (e.g. lost heritage, outdoor life) • Using ICT and being aware of trends & innovations as an integral part of tourism products (e.g. self-driving cars, navigation systems, etc.) • Niche product development

Destination management strategy	<ul style="list-style-type: none"> • Developing products/business in the context of the specific destination (regarding any aspect of the environment – social, economical, cultural, environmental, etc.) • Understanding and introducing visitor pay-back schemes for nature territories • Managing returning investment of EU funds and municipality budget • Understanding the Baltic States as a united tourism destination • Identifying tourism resources in the context of strategic development
Managing business operations	<ul style="list-style-type: none"> • Ability to survive, react to and adapt to changes in an unstable and challenging environment (e.g. popularity of sharing economy, infrastructural transformations) • Knowing the basic principles of business organizations and management in practice • Know-how of developing a business plan • Having financial competence and financial rationality • Improving human resource management skills to deal with work in a more stressful environment, to work with a new generation workforce demanding a totally different approach (motivation, quality control, loyalty, etc.), and to work with volunteers. • Improving project management skills • Managing stress at the work place • Improving efficiency by smart resource planning (time planning, setting priorities, etc.); • Developing knowledge of instruments, tools and efficiency measurement in the context of marketing activities and understanding the role of market research in decision-making in comparison to intuition-driven decisions • Understanding different forms of entrepreneurship and identifying the best form in a particular situation • Managing friction between the contradicting functions of organization (e.g. scientific work and customer service) as there is a growing number of organizations welcoming visitors in addition to their main goal • Adopting new ways to organize internal communication effectively, including ICT • Strengthening such competences as logics and mathematical thinking, argumentation skills and decision making skills • Gaining know-how to attract investments • Having knowledge of law • Developing event management skills – their role is increasing in several organizations • Understanding risk management, and the perception of risks in different cultures
Multisectorality, cooperation and networking	<ul style="list-style-type: none"> • Activating passive stakeholders for cooperation • Being innovative and creative when searching for cooperation partners • Intensifying cooperation for common purposes (e.g. destination marketing) • Activating the local community and building mutual relationships • Developing strategies and strengthening communication among sectors • Understanding how the tourism sector functions and what its relationship to the other sectors is • Developing networking skills
Digitalization	<ul style="list-style-type: none"> • Developing skills to do layout (posters, graphic design, collages), etc. • Developing skills to build and maintain websites and internal IT systems • Developing IT skills for marketing – advanced functions of googling, linking, sharing online, etc. • Understanding the principles of technology based cartography and applying them • Making videos and photos, editing them by using graphic design software

	<ul style="list-style-type: none"> • Having basic skills of ICT • Understanding the principles of interactive technologies and applying them • Ability to use specific tourism software and mobile applications (e.g. AMADEUS, GDS)
Customer service	<ul style="list-style-type: none"> • Improving knowledge of customer psychology • Improving conflict management competences • Improving communication skills to customers and finding a common language with guests • Strengthening hospitality
Languages	<ul style="list-style-type: none"> • Improving competence in Russian, English, German, Lithuanian, Chinese, and Spanish
Specific subjects	<ul style="list-style-type: none"> • Improving knowledge in such subjects and topics as geography, history, history of art and culture, contemporary culture

Table 3. Estonia: Relevant skills in international tourism business development

Category	Content
Cultural awareness (incl. internationalisation)	<ul style="list-style-type: none"> • Identifying and reaching various international target groups with a unified and coherent message based on Estonia's competitiveness • Improving hospitality skills based on cultural awareness • Understanding special characteristics of different cultures and their sensitivity to product offerings –language skills • Providing/modifying products that meet the needs of the international customer base – safety and security, sustainable green products, etc. • Need for a more value-based promotional strategy for the country, which would guide regional developments and product design • Cultural awareness in business communication
Multichannel sales and marketing communication	<ul style="list-style-type: none"> • Improving promotion and sales of tourism products by identifying, understanding and developing thematic domestic and international sales channels and models • Enhancing the visibility of destinations and product offerings in digital promotion and sales channels • Creative use of the tools and possibilities of digitalisation in sales and marketing: mobile technology, social media, web design, etc. • Developing digital services and a multi-channel customer experience by using user-oriented methods • Selling tourism products with a proactive and goal-oriented approach offline and online • Improving sales skills: prospecting, contacting potential customers, offering and presenting products • Awareness of the trends of digitalisation and future technologies in the global tourism business

Product development	<ul style="list-style-type: none"> • Using a more creative and bolder approach in a unique product design based on local heritage and using storytelling as a tool (a base of competitive product design) • Designing and offering diversified and well packaged high-quality products and experiences for target markets through more coherent promotional efforts both at the national and local level • Identifying business opportunities of the multisectoral business environment, developing competitive and versatile offerings from the interfaces of tourism and other fields both locally and regionally • Highlighting wellbeing benefits of the natural environment and local food in product development – authentic experiences are based on local heritage and products; this is a key to competitiveness • Differentiation of products to customer segments; tailoring and adjusting products to different needs and reasons to visit for domestic and international tourists and different generations • Using seasonality as a new tourism offering in more innovative ways • Developing products based on sustainable principles and long term development • Designing and developing customer-oriented products and experiences with service design methods (personas and experience waypoints)
Managing business operations	<ul style="list-style-type: none"> • Stressing the importance of organizational skills, the ability to manage your team and inspire them, good financial knowledge, and excellent marketing skills • The importance of innovation – current business models need a change • The ability of new leaders to be good visionaries and mentors who encourage their personnel • The importance of interpreting the global tourism environment and identifying changes in it • Developing analytical foresight skills and awareness of trends, understanding tourism as a system ("the big picture") • Developing an entrepreneurial attitude • Improving basic business literacy skills – quality, accuracy and speed in communication
Multisectorality and collaboration	<ul style="list-style-type: none"> • Improving cooperation and collaboration between different entrepreneurs as well as state and regional developmental organizations through improved communication and organizational skills • Creating new ideas and products through better communication and collaboration • Enabling cooperation across borders – regional cooperation is important for future product development and the identification of target markets • Recognizing value chains and value networks and utilizing strategic partnerships and cluster networks in tourism business development
Digitalization	<ul style="list-style-type: none"> • Improving the ability to use modern digital technology in product innovation to boost competitiveness
Language skills	<ul style="list-style-type: none"> • Improving the knowledge of current target market languages, but also new potential markets
Personal traits	<ul style="list-style-type: none"> • Developing (strengthening) hospitality skills – a welcoming attitude, openness, a sense of empathy and hospitality, civility, accuracy, and diplomacy (communication skills) • The importance of developing good leadership and management skills
Professionalism	<ul style="list-style-type: none"> • Increasing the understanding of tourism industry through practice as well as acquiring theoretical knowledge through special education (courses) • Increasing product innovation and service design knowledge through continuous education (lifelong learning)