Nordic Innovation

Policy Study on X-Nordic Tourism Innovation

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X Nordic Travel Contest

Nordic Innovation

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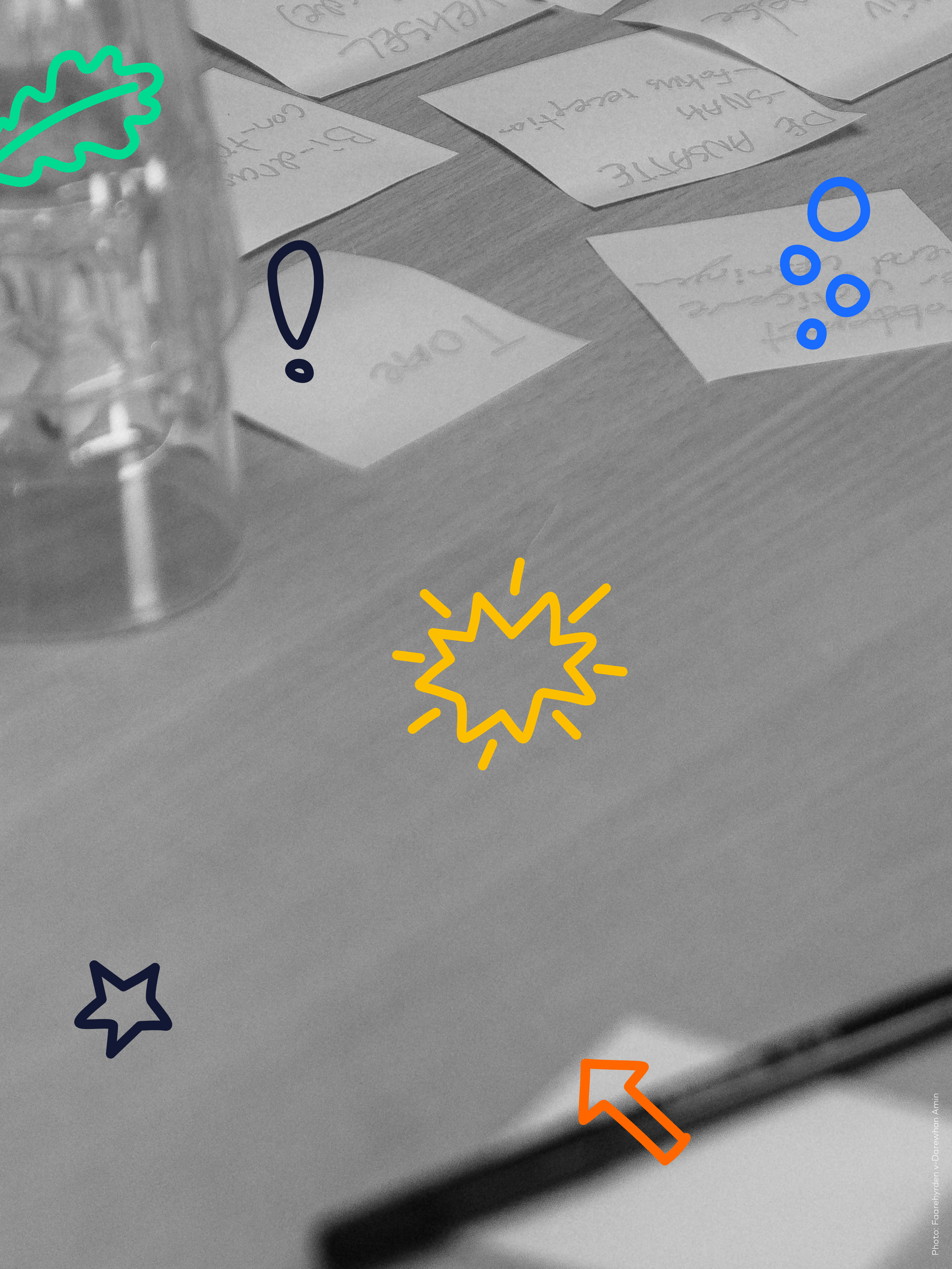

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Foreword: Solutions for the future of tourism

When Nordic Innovation launched the X-Nordic Travel Contest (XNTC) initiative, it was with clear motivation to build bridges across the Nordic travel technology landscape and address the fundamental problems and challenges facing the travel and tourism industry in the transition to a fossil-free and more sustainable future. Now, as the XNTC program is coming to an end, I am pleased to present this paper examining the innovation policies shaping our region's tourism future.

Throughout our program, a consistent observation emerged: despite our shared Nordic values and digital strengths, the travel technology communities in the Nordics are rather fragmented and operate with surprising independence from one another. The conversations with ambitious startups, established industry players, investment partners and political stakeholders have all pointed toward an opportunity – the chance to transform five distinct innovation ecosystems into one cohesive, powerful Nordic force.

This report does not just document what we found; it charts a path forward. It examines how thoughtful collaboration across borders could amplify what makes each Nordic country strong while addressing the fragmentation that limits our collective potential. The roundtable discussions that informed these findings brought together voices in the same conversation, revealing both challenges and promising possibilities.

I invite you to explore these insights with an eye toward action. The recommendations presented here are not merely academic – they represent practical steps toward a more integrated, innovative, and internationally competitive Nordic travel ecosystem.

Finally, a warm thank you to the long list of resource persons who generously contributed with their time and insights to this research paper – and thank you to Group NAO for putting it all together.

With optimism for our shared innovative future,

Hanna Törmänen and Emil Gejrot
Innovation Advisors
Nordic Innovation

Summary & main findings: There is a potential for more

Based on a review of more than 40 national policy papers and reports and 26 interviews with experts and stakeholders in the field, this research paper finds a rich potential for cross-Nordic collaboration and relation-building within travel and tourism innovation. Not only is travel and tourism an industry on the move with considerable technological change and substantial expectations when it comes to future growth. It is also a sector characterised by significant negative impacts on the climate, the environment and the local communities where it takes place. Nevertheless, the paper finds that today's travel tech community in the Nordics is rather fragmented, with weak relationships between the national clusters and programmes. In addition, the travel tech communities do not enjoy the same visibility and capitalisation as other tech communities in areas such as fintech, GreenTech or MedTech.

In conclusion, the paper points to the need for long-term programming for Nordic collaboration in tourism innovation as a driver for growth and a more sustainable future of tourism in the Nordics.

This research paper is a policy study of the goals, structure, and instruments of innovation policies in the Nordics – and especially *between* the Nordic countries – as they apply to the travel and tourism sector. The paper is written by the Copenhagenbased strategy agency, Group NAO on assignment from Nordic Innovation, part of the Nordic Council of Ministers. Group NAO is responsible of the content. The paper is published as the cross-Nordic innovation program, X-Nordic Travel Contest (XNTC), comes to an end after two years of extensive work identifying problems and solutions that can be accelerated and scaled for a more sustainable future of Nordic tourism.

The questions we are left with after XNTC are these:

Is there a potential for more/deeper cross-Nordic collaboration in travel and tourism innovation in the future? And if so, where can this potential be found and how can it be realized...and by whom?

...these are the questions we will process in the following based on our conversations with 26 with industry observers, experts, policymakers and stakeholders in the field, along with our review of relevant policy papers, national strategies and research papers (see sources in annex, pages 31 – 35).

MAIN FINDINGS: POTENTIAL FOR MORE

Our main findings in this research paper are as follows:

- **There is an overlooked potential in travel tech:** There is a great desire to collaborate: There is a widespread interest in cross-Nordic collaboration, but few formal structures and mandates to support it. The vast majority of the respondents see a great value in Nordic collaboration-building on the facts that we have a strong Nordic value base in common, and that international scalability is key. Respondents familiar with the recent Nordic innovation programs highlight the value of relationshipbuilding and the importance of international inspiration, perspective and sourcing for competencies and capital.

- **Potential lies not only in more tourism but better tourism:** Respondents generally share the view that the potential for cross-Nordic cooperation goes beyond accelerating startups and job creation for society. There is a shared sense of purpose and desire for improvement, whether it is focus on creating jobs for a more self-sustaining local community or sustainable solutions in all aspects of travel and tourism.

- **There is a shared perception that tourism as a sector is destined to grow** in the years ahead and that challenges associated with climate change and over-tourism will persist and call for new innovative solutions, which can best be pursued through partnerships and collaborations.

- **Need for consistent and focused programming:** Virtually all the respondents we spoke with value the joint Nordic programmes and hope for more initiatives in the future. There is a common perception that travel and tourism as a sector is somewhat overlooked at the national level when it comes to innovation promotion, support and capitalization. Consequently, the respondents see a natural and central role for the Nordic collaboration to keep pushing and pursuing the agenda with consistent effort.

On the more critical side, respondents' testimony can be summarised as follows:

- **Tourism innovation slipping through the cracks:** Interviewed experts and observers in tourism policies and innovation agree that tourism innovation is not high on the agenda in the national tourism strategies. Apart from the general praise and calling for better tourism, new innovative solutions and initiatives in product development (e.g., seasonal dispersion), there are generally few concrete innovation initiatives and programmes at national level.

  On the other hand, the national innovation strategies and policies to promote innovation and entrepreneurship are most often elaborate and strategic, but also not very sector-specific. In the eyes of most respondents, travel and tourism is a sector in the shadow of more "attractive" and capitalized clusters in fintech, MedTech and GreenTech, to name a few.

- **The Nordic travel-tech landscape is fragmented:** Respondents generally agree that the Nordic travel tech landscape is somewhat fragmented across the Nordics, with Iceland and Norway being the two noteworthy exceptions as both countries have well-organized travel-tech communities to show. In Denmark, the *HIT* project is a cross-country partnership and in Greenland, *Nalik Ventures* works with tourism startups as part of a national focus on tourism as a future growth industry. Overall, however, relations between the communities seem sporadic and dependent on Nordic project initiatives.

- **Funding is inconsistent and rarely adapted to the small scale and seasonal nature of tourism businesses:** Each country operates its own system, shaped by national priorities, bureaucracies and definitions of innovation. This disconnect is worsened by a lack of common understanding of what innovation is, often confused with day-to-day business development or short-term sales optimisation. The tourism sector, unlike traditional industries such as manufacturing or agriculture, struggles to access dedicated innovation funding and is often overlooked in national policy according to respondents.

- **We compete as individual countries, not a Nordic community with shared infrastructure:** Competition among countries for visitors and markets distracts attention from synergies and opportunities at the Nordic level. While political rhetoric supports Nordic cooperation, practical collaboration tends to occur between neighbours with similar conditions. Respondents do not see a lot of shared infrastructure for knowledge exchange, data-sharing or funding access.

- **Different worlds:** Meanwhile, actors on the ground – especially SMEs – lack the time, capacity and financial stability to engage in long-term innovation efforts. Public agencies are often unsure how to support innovation in tourism, and private actors are focused on survival or short-term growth. Without clearer mandates, structural support and stable financing, innovation remains sporadic and driven by isolated projects.

RECOMMENDATIONS: A PERMANENT PLATFORM

So, how do we move forward? Based on the review of Nordic policies and strategies and the expert interviews, we have extracted the following recommendations for the future of tourism innovation in the Nordics:

- **A need for a more permanent platform:** To move forward, some respondents suggest establishing a more permanent Nordic Tourism Innovation Platform, with staff drawn from across countries and a clear coordinating mandate. National agencies and public tourism boards should act as co-pilots in aligning strategies and linking innovation with real industry needs.

  The platform could drive the innovation agenda in multiple ways. Upskilling efforts should include policymakers and destination professionals, not just businesses, with short bootcamps or training on innovation thinking and systems change. Cross-border "learning sprints" and thematic networks on areas like AI, sustainability or cruise policy could help connect fragmented efforts. Finally, a joint Nordic helpdesk for EU funding would lower thresholds for accessing international resources, while shared off-season pilots and harmonised data platforms could unlock new models for collaborative, scalable tourism innovation. Without structure, coordination and long-term investment, Nordic collaboration in tourism innovation will remain more an idea than a reality.

- **Formation of thematic clusters and innovation alliances:** More generally, several respondents have called for specialised networks across countries but focus on shared challenges or opportunities. Such a Nordic cluster could be on tourism and AI, or a working group on sustainable cruise tourism policy and innovation. There are already established cross-national structures in place – NorReg and AI Opener for Destinations, to mention two – but there may very well be room for more.

- **Secure accessible funding for SMEs and startups:** This idea from conversations is about designing funding mechanisms tailored to the reality of micro and small tourism businesses – with simplified application processes, higher co-financing rates, and longer timeframes. Such

  initiatives could be joint Nordic travel-tech calls (offering more than 50% funding), or innovation vouchers for local pilots that can be scaled across borders.

- **Develop a shared innovation framework and clear mandates in all countries:** Define what tourism innovation *means* across the region – and ensure all countries have clear national priorities and mandates that include Nordic collaboration as a goal. Earlier this year, Nordic Innovation and Group NAO published *A Nordic Tourism Innovation Guidebook* with learnings from the XNTC project. The question now is how to ensure that the learnings are studied and adopted in the Nordic innovation systems to help align strategy, expectations and approaches across ministries and agencies. A common purpose in initiatives to facilitate shared understanding and concerted effort on a Nordic level needs to be ensured.

There are more recommendations to be found at the end of this report.

Photo: Cat Gundry-Beck

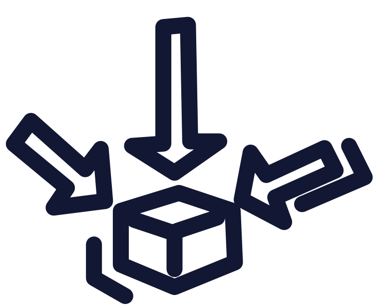
What we did & how to read

This Policy Paper is divided into two parts. Before diving into them, these first pages serve as an introduction – depicting the guiding questions, the methodology and guidance on how you should read the Policy Paper.

GUIDING QUESTIONS

Four key questions have influenced all desk research and interviews:

- *Is there a potential for cross-Nordic collaboration on tourism innovation and travel-tech startups?* This basic question is a pivotal one.
- *What and where is the potential for cross-Nordic collaboration to be found?* What are the concrete needs and opportunities we can address together?
- *What are the barriers and challenges for cross-Nordic collaboration on tourism innovation and travel-tech startups?* These must be identified to jointly advance further on the path of Nordic collaboration.
- *Who should do what in the landscape of policymakers, stakeholders, startup communities and funding parties?* After all, things seldom happen on their own.



METHODOLOGY

This policy paper is based on both desk research and a series of interviews with stakeholders from all Nordic countries.

- **Desk Research:** The methodology draws on multiple and diverse written sources. Roughly forty sources include official statistical reports and data from national public authorities, as well as government policy documents, strategies and white papers. The report spans beyond solely tourism innovation and equally incorporates national innovation systems and policies in general, as well as broader national policy agendas. Some reports of relevance for the topic have also been shared by interviewees in connection with the interviews.

- **Interviews & Conversations:** The methodology involved conducting qualitative interviews as a key component of the research. The purpose was to understand barriers and potentials for cross-Nordic collaboration on tourism innovation and gain insights from relevant government authorities, organisations and stakeholders. Semi-structured interviews were conducted with representatives from various entities, including innovation clusters and business development agencies. A total of over 26 interviews were carried out across all Nordic countries and autonomous regions (Denmark, Finland, Iceland, Norway, Sweden, Åland, Faroe Islands and Greenland). Snowballing was also used to identify additional relevant interviewees. Interviews were recorded to support thorough analysis. The interview data was summarised and analysed to identify overarching patterns and themes. These findings were presented and discussed in an online roundtable with interviewees and policymakers for validation and further input. The insights gathered from these interviews and the roundtable discussion have formed this policy paper and its recommendations.

HOW TO READ THIS POLICY STUDY

This policy paper offers a structured view of the Nordic tourism innovation landscape and highlights the untapped potential for cross-border collaboration.

- **Part 1** provides a country-by-country overview of current systems, strategies, and actors in tourism innovation and travel-tech, with an emphasis on digitalisation and sustainability. Part 1 is almost exclusively based on written sources.

- **Part 2** brings forward voices from across the Nordic region, reflecting shared ambitions, structural barriers and the lived reality of tourism stakeholders.

Thus, the report blends desk research with interview insights to expose systemic gaps and suggest actionable ways forward. Read it as both a mapping of today's state and a call for long-term coordination, funding and clearer mandates to unlock shared innovation capacity in the Nordics.

Part I: The Nordic innovation system

The first part of the policy paper provides an overview and assessment of the current innovation landscape and structures in the Nordic countries. In general, we see well-structured and focused innovation systems across the Nordics with elaborate government policies and vibrant economic clusters in areas such as fintech, FoodTech, MedTech and more throughout the countries. In parallel, most countries have elaborate tourism policies – almost all mission-based and aiming for sustainable growth – spanning marketing, destination development and multiple subsectors of tourism. Still, in our reading, only a few of the Nordic countries have national policies directly targeting the cross-section of innovation and tourism development with substantial initiatives and funding. In other words, – and with notable exceptions - tourism + innovation or travel + tech are not really Nordic fusions.

GENERAL NATIONAL CHARACTERISTICS

In the following section, we give a brief overview of the national innovation systems with special attention to travel and tourism.

- **Finland:** The Finnish innovation system has evolved from a technology-driven approach to one that incorporates systems thinking and aims to address societal challenges. Its administrative structure is described as a "two-pillar" system involving the *Ministry of Education and Culture* and the *Ministry of Economic Affairs and Employment*, which are responsible for public research and innovation policies and oversee key agencies (Giacometti & Jensen, 2024). Unsurprisingly, important actors include Finland's universities, state research institutes, university hospitals, municipalities, and companies collaborating within ecosystems and clusters, supported by organisations like *Business Finland* and the *Research Council of Finland* (Giacometti & Jensen, 2024; Ministry of Economic Affairs and Employment of Finland, 2021; Valtioneuvosto Statsrådet Finland, 2020; Valtioneuvosto Statsrådet Finland, 2024). Funding for R&D is significantly driven by the private sector, accounting for 68% of expenditure in 2022, with state funding provided through the budget and competitive appropriations via various agencies (Giacometti & Jensen, 2024; Ministry of Economic Affairs and Employment of Finland, 2021).

Specifically regarding tourism, Finland's innovation system is guided by the national tourism strategy for 2022–2028, which aims for sustainable growth and renewal (OECD, 2022; Työ- ja elinkeinoministeriö, 2022). Key priorities for achieving this vision include supporting sustainable development and responding to digital change, the latter of which is seen as a key driver for tourism innovation and new business models (OECD, 2022; Nordic Council of Ministers, 2019; Työ- ja elinkeinoministeriö, 2022). *Business Finland* plays a role in promoting tourism and fostering industry development through technology and innovation, with *Visit Finland* (a state-funded unit of *Business Finland*) working with the industry on promotion, development, and internationalisation. However, as several interviewees pointed out, funding was cut at the end of 2024, which slows down continuous work on development and innovation. Nonetheless, previously developed tools are still in place. Additionally, in the Finnish autonomous region of Åland, the strategy "Färdplan för hållbar turism 2030" (Roadmap for Sustainable Tourism 2030) is in place, prioritising digital competence and access to real-time tourism data (Ålands landskapsregering, 2024), as interviewees pointed out as well. In this context, innovation is fostered via initiatives like the Innovation Lab of the Åland University of Applied Sciences, supporting collaborative idea development and product innovation.

- **Sweden:** The Swedish innovation system has historically emphasised technology-based strategies and process innovations but has increasingly shifted towards addressing societal challenges and driving system change, representing a third generation of innovation policy (Giacometti & Jensen, 2024; Johansson, 2023). Key actors include various government agencies like *Vinnova, Formas, Forte,* the *Swedish Research Council,* and the *Swedish Energy Agency,* alongside companies, academia, the public sector, and civil society (Arnold et al., 2019; Giacometti & Jensen, 2024; Johansson, 2023). Funding often involves joint programmes by these agencies, frequently requiring match funding from industry (Arnold et al., 2019). While the formal structure may appear top-down, as in Finland, regional and local actors significantly reinterpret innovation policies in practice, and missions can be stakeholder-driven (Giacometti & Jensen, 2024). Despite Sweden's historically strong position in innovation, the country faces challenges in retaining its innovative edge, prompting key players, such as *Vinnova*, to call for increased state investments into research and innovation (Vinnova, 2023).

  In Sweden, there is no national strategy specifically for the tourism industry. One was drafted in 2021 (highlighting the vision "Sweden is one of the world's most sustainable and attractive countries by 2030, based on innovation") (OECD, 2022; Regeringskansliet Sverige, 2022), but, as interviewed stakeholders mentioned, it was later withdrawn in 2022. Since the new government was installed in autumn 2022, the tourism industry is merely seen as part of the overall strategy for economic growth. As an interviewee emphasised, Sweden is entirely unique in the sense that tourism is categorised as part of "cultural & creative industries" within the EU categories and, therefore, is not technically acknowledged as an industry of its own. No other country in the EU categorises it that way. In this national context, public actors like *The Swedish Agency for Economic and Regional Growth, Visit Sweden,* and regional networks collaborate on an innovation agenda to strengthen national cooperation ("Smartare tillsammans" – Smarter together), increase capacity, and prioritise innovation areas for sustainable place development (Östberg & Malmer, 2025). This also includes how the public actors themselves can enhance their innovative ability and skills over time (and not only addressing what the private sector could do) (Johansson, 2023; Östberg & Malmer, 2025). A lack of coherent policy and insufficient, tailored tourism innovation funding are identified hindrances, alongside complex regulations and the industry's weak integration into the generic innovation system (Johansson, 2013; Östberg & Malmer, 2025). Project-based funding can also be applied for via *The Swedish Agency for Economic and Regional Growth* (Nordic Council of Ministers, 2019) or, as interviewees added, *The Swedish Board of Agriculture,* where relevant.

- **Denmark:** The Danish innovation system has historically been somewhat siloed and layered between universities, innovation and technology centres, science parks and incubators (Giacometti & Jensen, 2024). There has been a general shift towards addressing societal challenges and implementing mission-oriented innovation policies, though not all align strictly with the challenge-based approach (Danmarks Forsknings- og Innovationspolitiske Råd, 2023b; Giacometti & Jensen , 2024). Key actors top-down include the *Ministry of Higher Education and Science* for knowledge-based innovation policy, the *Ministry of Industry, Business and Financial Affairs* for business support (including the national cluster programme and regional business beacons), and other ministries for domain-specific programmes (Giacometti & Jensen, 2024). A unique aspect is a very large role played by private foundations in funding research, alongside state funding allocated through various instruments and competitive bidding processes, although the system was previously seen as primarily supporting standalone projects (Danmarks Forsknings- og Innovationspolitiske Råd, 2023b; Giacometti & Jensen, 2024; Ministry of Higher Education and Science Denmark, 2020). An international expert panel in 2019 noted a need for a comprehensive national strategy and better conversion of research into innovation, pointing out challenges with fragmentation and coordination in the system (Danmarks Forsknings- og Innovationspolitiske Råd, 2023a; Ministry of Higher Education and Science Denmark, 2020). The formal structure involves a mix of top-down priority setting by the government and more bottom-up goal and action definition involving stakeholders (Giacometti & Jensen, 2024; Ministry of Higher Education and Science Denmark, 2020).

Within tourism, Denmark's innovation efforts are guided by a national strategy for sustainable tourism which includes priorities like sustainable development and improved data infrastructure (OECD, 2022; VisitDenmark, 2023). *VisitDenmark* and *Danish Coastal and Nature Tourism* both play central roles, responsible for international marketing, implementing the national strategy, and acting as a national analysis unit and convener of the partnership for sustainable tourism development (Nordic Council of Ministers, 2019; OECD, 2022; VisitDenmark, 2023). Innovation at destination level is being pursued through initiatives such as a nationwide DataHub to provide data insights for destination and business development, sales, marketing, and understanding consumption, mobility, and behaviour (VisitDenmark, 2023). As interviewees mentioned, the Danish government has also put a national granting system in place, awarding destinations (DMOs) grants for initiatives in sustainable destination development.

- **Norway:** Norway's innovation system has gradually evolved over the last decade but still faces limitations in addressing societal challenges (Arnold et al., 2019; Larrue, 2021). Key actors include the *Research Council of Norway,* which specialises in research and technological innovation and plays a key coordinating role, and *Innovation Norway,* which focuses on non-technological innovation and wider business support (Arnold et al., 2019). Funding is provided through government budget allocations and gross domestic spending on R&D, with instruments like tax incentives and direct grants aimed at activating R&D by firms (Arnold et al., 2019; Larrue, 2021). The system is described using the 'national innovation system' heuristic and employs a mix of bottom-up and thematic funding (Arnold et al., 2019).

  Within tourism, Norway's national strategy aims to enhance value creation and promote sustainable development (Innovation Norway, 2021; Nordic Council of Ministers, 2019). *Innovation Norway* is the national tourism organisation, responsible for international branding, destination development, and providing support like grants and loans to companies (Innovation Norway, 2021; Nordic Council of Ministers, 2019; OECD, 2022). Digitalisation is identified as a key driver for tourism innovation, enabling new business models and potentially creating opportunities for unique travel-tech solutions that are scalable and exportable (Innovation Norway, 2021). Reports depict a need to accelerate the digital shift and encourage collaboration on new digital business opportunities, potentially leveraging the national cluster programme – Norwegian Innovation Clusters (Innovation Norway, 2021). A notable player in the tourism innovation landscape is also the *Nordic Travel Tech Lab,* centred on the mission of encouraging cooperation among industry partners and boosting innovation and investment in the travel-tech sector, both within Norway and other Nordic countries (Nordic Travel Tech Lab, 2022).

- **Iceland:** An extensive OECD study (Koutsogeorgopoulou & Cho, 2021) finds that Iceland's innovation system is characterised as innovative but with untapped potential, particularly in the digital era and for smaller firms. The system is guided by policies like the 10-year Innovation Policy "The Innovative Iceland," which focuses on mindset, finance, market access, supporting frameworks (agencies) and human resources. Funding for research, development and innovation includes a generous R&D tax incentive scheme, direct funding from the government and initiatives like the *Kría* startup and innovation fund. While the system's structure has seen initiatives to enhance coordination and address fragmentation, challenges remain in areas like converting research into innovation and ensuring effective public support for business R&D. Additional challenges include ensuring smaller firms adopt digital technologies and improving access to financing like business angel investment. Main innovation actors include firms, universities, research institutes and government agencies, with a need for stronger collaboration between industry and research sectors.

  Within tourism, Iceland's innovation is largely driven by national strategies like the Tourism Policy Framework 2020-30, which heavily emphasises sustainable development, shared value creation, and the use of technology and innovation mechanisms (Icelandic Tourist Board, 2019; OECD, 2022). Key actors in the tourism innovation system include the *Icelandic Tourist Board* (as the national tourism authority), *Business Iceland* for marketing, and the *Ministry of Industries and Innovation,* alongside industry associations and clusters like *Ferðaklasinn* (OECD, 2022; Nordic Council of Ministers, 2019). In addition, the *Iceland Tourism Cluste*r functions as the innovation wheel for Icelandic tourism, as an interviewee pointed out, concentrating on sustainability, innovation, travel-tech and digitalisation by helping established companies innovate and collaborating with KLAK Icelandic Startups on accelerator programs for new companies and startups, and is also responsible for actions regarding sustainable and regenerative tourism (Iceland Tourism Cluster, 2024). Digitalisation is seen as a crucial driver for innovation, enabling new business models and potentially increasing profitability (Koutsogeorgopoulou & Cho, 2021; OECD, 2022; Nordic Council of Ministers, 2019). For travel-tech startups specifically, initiatives exist such as the renewed Startup Tourism accelerator programme run by *KLAK Icelandic Startups* and *Ferðaklasinn,* and a digital "sandbox" platform designed to foster collaboration between tourism and technology companies (OECD, 2022).

- **Greenland:** Within the Greenlandic innovation landscape, a key actor is *Nalik Ventures,* which functions as a connector, particularly by linking businesses to various funding pools, including those from the EU and Nordic cooperation. *Nalik Ventures* has a strong focus on supporting the travel and tourism sector, also due to the substantial investment in new airports in Greenland, as interviews revealed. Within tourism, responsibility lies with the *Ministry of Industry and Energy* in the Greenland self-rule government. *Visit Greenland* is the national tourism board and a government-owned agency responsible for branding, promotion and developing the industry. Visit Greenland acts as an advisor to the government and pursues a project-based approach, collaborating with stakeholders including *Greenland Business Association, Nalik Ventures, Bank of Greenland,* local destinations and municipalities and industry operators (Nordic Council of Ministers, 2019).

The government of Greenland recently published a sector plan for tourism (2024), pointing to tourism as a strategic sector for Greenland's economy and society in the decades ahead. The plan aims to double the pre-2024 tourism levels and boost the sector's share on total exports to 40%. The plan is also specific about the demand for sustainable and responsible tourism. Following on the sector plan, *Visit Greenland* has launched a 10-year vision for tourism with the title "Kalallit Nunaatt – and all that we share" aiming to ensure that tourism is adding value to the country's local communities, cultural sector, nature and society more broadly (Visit Greenland, 2025).

- **Faroe Islands:** The landscape in Faroe Islands is characterised by increasingly recognised strategic importance of research and innovation. One of the key actors, the *Council for Research, Development and Innovation* calls for bigger public budget allocation as well as further innovation centres development and strengthened international cooperation in order to ensure a strong innovation environment in Faroe Islands (Ráðið fyri gransking, menning og nýskapan og Granskingarráðið, 2023). Within tourism, the Faroe Islands have a national tourism strategy published in 2023, titled HEIM 2030, drawing on a previous strategy developed by a working group including industry, municipalities, tourism information offices, nature conservation and government officials (Visit Faroe Islands, 2023). *Visit Faroe Islands* serves as the national tourism board with regional tourist offices handling local development and marketing (Nordic Council of Ministers, 2019). A new development department within *Visit Faroe Islands* also works with local authorities on product development and better organising the internal industry. The strategy's main focus is on sustainability and the positive contribution of tourism to making the Faroe Islands a better place socially, economically and environmentally (Visit Faroe Islands, 2023). In the context of tourism innovation, *Hugskotið* is an innovation hub in Tórshavn that serves as an incubator for entrepreneurs across sectors, including tourism and travel-tech. Through the program "Innovation in Tourism," it supports new and existing businesses in developing innovative solutions for the tourism industry, as one interviewee explained.

Photo: Johannes Jansson / norden.org

NATIONAL STAKEHOLDERS IN THE NORDIC TRAVEL INNOVATON AND TECHNOLOGY LANDSCAPE

Based on the review of national policies and strategies and out of interviews, discussed in the next section, it is clear that the Nordic Council of Ministers and the Nordic Tourism Working Group in particular have a special role to play as both the overarching agenda drivers and facilitators of policy alignment, and as an engaging party initiating programs and mechanisms encouraging cross-Nordic collaborations.

As we shall see in part two below, the respondents all look to the Nordic institutions to level the fact that the national innovation systems seem somewhat siloed to their domestic landscapes, and secondly, that the national tourism strategies generally seem a little foggy on how to unfold the innovation goals and priorities in practice – with relevant partnerships in the innovation communities and aiming for a competitive market reality.

Below, **Table 1** provides an overview of observations made above.

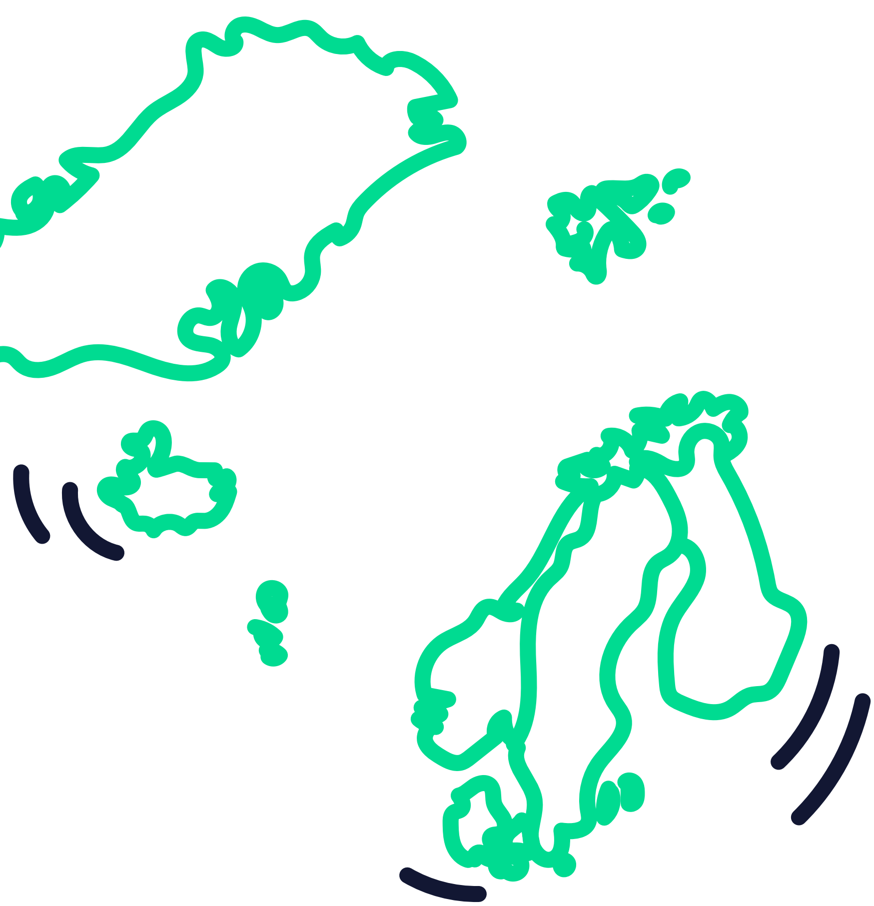


Table 1:

OVERVIEW: National stakeholders in the Nordic travel innovation and technology landscape

Region / Dimension	Denmark	Sweden	Norway	Finland	Iceland	Greenland	Faroe Islands	Cross-Nordic
General Innovation Landscape								
Innovation policy focus and goals	Green transition	Sustainability, Growth, Digitalisation, Attractiveness, Competitive-ness, Resillience	Digitalisation	ICT, but increased focus on ecological and societal topics	Green solutions, health tech-nology	Economic self-sufficiency, strengthened startup commnity	Competitiveness, increased collaboration with local stake-holders (e.g., University of Faroe Islands), enhanced international cooperation	Solutions to climate crisis and challenges of green transition and sustainable travel
Key players and policy bodies	Ministry of Higher Education and Science, Ministry of Industry, Business and Financial Affairs, Innovation Fund Denmark, DFiR	Vinnova, Formas, The Swedish Research Council, Forte, Swedish Energy Agency, BFUF (Research)	Ministry of Trade, Industry and Fisheries, Innovation Norway, Research Council of Norway	Ministry of Economic Affairs and Employment, Ministry of Education and Culture, Research Council of Finland	Ministry of Industries and Innovation, Science and Technology Policy Council, Ministry of Foreign Affairs	Nalik Ventures, Ministry of Industry and Energy	Ráðið fyri gransking, menning og nýskapan (Council for Research, Development & Innovation), Ministry of Foreign Affairs and Trade	Nordic Council of Ministers
Notable funding framework	Innovation Fund Denmark, Statealocated tourism innovation funds	Vinnova, Formas, The Swedish Research Council, Forte, Swedish Energy Agency, BFUF (Research), Swedish Incubators & Science Parks (SISP), The Swedish Agency for Economic and Regional Growth	Loans from Innovation Norway, tax incentive schemes	Ministry of Economic Affairs and Employment, Ministry of Education and Culture	Bigger Tourism industry actors (such as Blue Lagoon), Ministry of Tourism, Kría (publicly-owned VC fund), tax incentive schemes	Micro loans from Nalik Ventures, Vestnorden Fonden (for SMEs)	Vinnuframi (foundation under the Faroese Ministry of Foreign Affairs and Trade), Framtak, Føroya-grunnurin (Faroe Foundation) & Betri stuðul (Betri Support) for smaller projects, Vest-norden Fonden (for SMEs)	Nordic Council of Ministers, Nordic Innovation
Innovation-dominant sectors and clusters	Health tech	High tech, health, energy	Aquaculture and other maritime sectors	ICT, electronics, computers and electrical equipment	Energy and fishing sectors	Tourism, services, industry, ICT and more.	Marine and aquaculture	Multible sectors spanning energy, tourism, food, smart cities and more
Tourism Innovation Landscape								
Travel-tech clusters/ programs	HIT - Hub for Innovation in Tourism	N/A	Nordic Travel Tech Lab	N/A	Iceland Tourism Cluster, KLAK	N/A	Hugskotið	NorReg - Nordic Renerative Tourism, cross Nordic Pro-gram 2022-2025. XNTC - Start-up accelerations, 2022-2025. Upcoming: Innovative Solutions for 2030 & Nordic Forward: Resilience and Competitive-ness for 2050
Key tourism policy bodies	VisitDenmark, Dansk Kyst og Naturturisme	Visit Sweden	Innovation Norway, Norsk Reiseliv	Business Finland / Visit Finland	Icelandic Tourist Board, Business Iceland	Visit Greenland	Visit Faroe Islands	Cross-Nordic Tourism Working Group
Focus on tourism innovation	HIT - program - Hub for Innovation in Tourism	Project-based funding via Tillväxtverket and Jordbruks-verket. National Agenda for public stakeholders.	Technology adoption, digitalisation	Sustainability, digitalisation, DataHub for tourism business digital opportunities	Responsible tourism, product development, environmental preservation	Digitalisation, sustainability, nature and culture preservation	Innovative MICE development, agro and marine tourism, data and knowledge collection & sharing enhance-ment	Nordic Tourism Plan 2025- 2030 aims for sustainable tourism, competitive and innovative Nordics

Sources: Multiple policy papers, national strategies and websites of stakeholders mentioned (see sources in annex).

Photo: Johannes Jansson / norden.org

Part II: What the stakeholders see

As we shall see in the following, the stakeholders we have interviewed share a clear interest, hope and commitment to increased formal Nordic cooperation on tourism innovation, which would strengthen many stakeholders' own institutions, national tourism efforts and the Nordic region as a destination. Virtually all the respondents we spoke with value the joint Nordic programmes and hope for more initiatives in the future. There is a common perception that travel and tourism as a sector is somewhat overlooked at the national level when it comes to innovation promotion, support and capitalization. Consequently, the respondents see a natural and central role for the Nordic cooperation to keep pushing and pursuing the agenda with consistent effort. Nevertheless, stakeholders also see barriers and obstacles on the way, which we will also elaborate on in this section.

THE POTENTIAL FOR CROSS-NORDIC COLLABORATIONS

When discussing the potential for future Nordic tourism innovation, the underlying assumption is that travel and tourism in the Nordics will grow in the future and that a stronger focus on innovation and startup acceleration is an effective way to build Nordic competitiveness and thereby create new jobs and value added for the Nordic societies. In many of our conversations, the potential benefit of tourism innovation and stronger Nordic collaboration also gets much more specific. It is about learning and finding partners. It is about access to nearby markets. It is about finding capital, competencies and talent. And in the end, it is often about shared values and the common wish to build a better world with better tourism – read: identify practical and scalable solutions to the wicked problems of unsustainable (over-)tourism.

But we are not there today. Across most of our conversations, we find the perception that national tourism policies generally do not assign much priority to innovation and startups, while, at the same time, innovation policies generally do not give the tourism sector much attention. This observation was confirmed in a roundtable discussion, which took part during this project, along with a number of other barriers and problems identified throughout the research:

- **Fragmented organisations:** According to the majority of interviewed stakeholders we have talked to, the tourism innovation system in the Nordic countries can be described as somewhat fragmented, both within each nation and across the region. This internal fragmentation stems from the tourism industry being largely composed of small, place-based businesses with limited resources and a weak connection to broader innovation systems.

  Furthermore, some respondents point to the fact that not all countries can show a concrete national mandate or specific policies focused on tourism innovation – the landscape is often dominated by either traditional destination development efforts or innovation policies designed as general frameworks, with no specific priority given to tourism-related issues or clusters.

  This may explain why cross-Nordic collaboration often remains project-based and sporadic rather than strategically continuous. According to some interviewees, this frequently results in ad-hoc collaborations occurring rather randomly or between parties with shared ideas and domains, and not as a result of an intentional and systematic effort to grow a cross-Nordic travel-tech cluster or strategic partnerships across the Nordics in the intersection of the traditional industry operators and new technology-driven entrepreneurs and startups. In this situation, many stakeholders we have talked to believe that increased collaboration should come from the Nordic governments/ministers, and it would come preferably with additional political backing and incentives from national governments.

> ***"The tourism industry has historically been fragmented, weak and without joint powers to actually succeed in entering the general innovation system in an efficient way."***
>
> NTO employee

- **Little incentive to build international partnerships in national tourism policies:** In a few of our conversations, interviewees have pointed to the fact that without political backing at the national level, there is little motivation for cross-border collaborations or partnerships on innovation promotion and cluster building. Differing national structures, funding models and priorities also contribute to this disintegration. As an example, pointed out by a Danish interviewee, the extensive Danish program for tourism development offers approx. DKK 200 million in grants for sustainable destination development, but grants can only be given to Danish destinations, and there is no incentive for applicants to build international partnerships or network relations.

"What's needed is a vision, measurable goals (and strategies to reach those goals) as well as putting those goals in a concrete roadmap. Far too often it gets too general and non-specific".

Start-up expert

"If this shall be taken seriously, all Nordic countries must agree on a common position and goal for the coming five or ten years. If such decision would be taken, all startups would automatically pop up and thrive."

Start-up expert

"A policy is worth nothing (and isn't going to change anything) without an agreed strategy."

Start-up expert

- **Poor access to funding is a barrier to more collaborative initiatives and output:** As different national policies and practices are followed and some national actors mention low margins in the industry and lack of funding sources for acceleration, programs with added resources for Nordic collaboration are pinpointed as a desired trigger for cross-Nordic initiatives. Specifically, some interviewees mentioned access to seed funding and a more "open door apparatus" for the startup community and their partners – and for it to be easier to know, who to address. However, fundamentally, several of our respondents highlight that travel and tourism as a sector is under-capitalised compared to other sectors and industries.

"Investors' general interest in innovation and business ideas in tourism is very low. Sometimes it's just not smart enough, but often it's not scalable. The capital just isn't there for tourism."

Innovation Agency employee

- **Close, but still far away:** According to some of our interviewees, the Nordic countries are relatively close to one another geographically and culturally, but language can still sometimes present a barrier to collaboration – notably between Finnish and other Nordic languages. Existing or recent collaborations often tend to favour geographical proximity and similarity in conditions, as seen in the stronger cooperation between the Faroe Islands and Iceland, or Greenland looking to Iceland for relevant experience. Regions in western Sweden naturally turn to Norway instead of Finland. The Finnish have a coastal route project with North Sweden. Regions facing comparable challenges find it easier to connect and understand each other without extensive explanation. This preference for proximity can mean that some collaborations are confined to neighbouring areas rather than developing broader Nordic partnerships.

- **Overlooked industry:** Several interviewed stakeholders note that the tourism industry in the Nordics is somewhat overlooked in national priorities when it comes to innovation funding compared to sectors like FinTech or MedTech. This observation partly stems from the lack of a clear national mandate, or specific programs dedicated solely to tourism innovation in some countries. As interview and report data revealed, the situation varies, with Iceland having dedicated structures like a tourism innovation cluster, Greenland devoting special focus on the growing industry, while, for example, Sweden notes the absence of a specific national mandate for cross-Nordic collaboration as a disadvantage. Furthermore, in places like the Faroe Islands, recent focus has been on post-pandemic survival and infrastructure, hypothetically diverting attention and resources away from innovation. Last but not least, all "smart innovators" tend to join and develop products/services "where the money is" and where market opportunities are scalable.

"The innovation systems are still very linked to the traditional industries in each country. Agriculture in Denmark, manufacturing in Sweden, forestry industry in Finland, fishing industry in Iceland etc. Traditional industries tend to get innovation funding more easily than the service sector."

NTO employee

- **Inadequate scalability:** Some of our sources note that many tourism businesses in the Nordics operate at a small scale, which can limit their capacity and resources for innovation and collaboration. National funding mechanisms are frequently perceived as unsuitable for the numerous small tourism businesses. Funding for acceleration and scaling usually doesn't come alone – startups often also need management coaching, competent match-making, market insights and support in partnerships, which suggest that future programs should be integrated/located in cluster environments and networks where these intangible resources are present.

"As there are many micro companies in the tourism industry, the innovation height is not especially high. Innovative solutions rather fix local problems but are not really paving the way for a disruptive change for the whole industry (or adding value to other industries)".

NTO employee

- **Comrades, but still competitors:** While Nordic countries share a vision for greater integration, they also act as competitors in the tourism market according to some interviewees. This competition primarily revolves around attracting the same international visitors, investors and talents. This competition fact creates a tension where businesses/organisations sometimes are hesitant to share knowledge. Consequently, successful cross-Nordic initiatives often require a clear mutual benefit, aiming for a "win-win-win" outcome for all involved parties (the country, the other country and the Nordics). This means collaboration may be challenging unless priorities align and there is a tangible advantage for national actors, who are often focused inward due to differing structures and mandates.

> ***"What's the added value of doing this together, compared to doing it individually?"***
>
> Start-up expert

- **Core understanding of innovation:** There is a significant lack of knowledge and understanding of what innovation is in the traditional tourism industry. This sometimes extends to the highest levels, including political and management tiers, contributing to a lack of endurance in pursuing innovation efforts, according to some of our sources. There are also differing ideas about the concept of innovation. Furthermore, expectations regarding innovation are often wrong or overly high, leading to disappointment with seemingly frequent failures or incremental results contrasting the belief that innovation must be an entirely new, world-changing invention.

> ***"Innovation is such a big word, so it frightens the small companies."***
>
> NTO employee

In the industry, innovation as a concept can also be misunderstood within the tourism and travel industry itself. From a tourism company's perspective, the borderline between the insightful day-to-day business hacks and the long-term innovative system change for the industry is not that sharp. Actors within the tourism industry are still very operational, scarcely staffed and impatient to find quick wins. That means favouring direct sales opportunities as opposed to system-shifting (time-consuming) innovations.

In tourism, one interviewee pointed out that there appears to be a significant challenge in distinguishing "innovation" (intra-firm) from "development of experiences," which is traditionally a discipline where multiple stakeholders in a destination co-create a new offering in the public domain (e.g., a new scenic hiking route). While innovation is often described as turning ideas into realised, valuable solutions (whether incremental or radical), some interviewees or documents seem to view it as closely related to or a key component of broader product or business development efforts. The roundtable discussion deepened this by highlighting the need to differentiate between "business innovation" for small and medium enterprises (SMEs) and "mission innovation" for large, systemic challenges.

> ***"What is business development and what is innovation? I would say many of the things we collaborate on a Nordic level is rather business development and not pure innovation."***
>
> NTO employee

- **No time for innovation:** Public actors may support both "innovative" and "product development" projects, but neither national tourism innovation programs nor general innovation funding schemes tend to be well-adapted to the industry's predominantly small businesses. Private actors, particularly small and medium-sized enterprises (SMEs) often balance two priorities. They seek to optimize their business model while trying to survive, which can mean that dedicated innovation efforts are viewed as secondary or less achievable than ongoing operational improvements.

  A couple of roundtable participants stressed the importance of including large Nordic companies (e.g., Strawberry, Live Nation) in innovation efforts. These larger entities are already spread across the Nordics and could provide long-term strength and integrate innovation into the system more naturally, as many smaller industries are connected to them.

> ***"Content is queen because model is king. If you don't have the model and tools to go from the idea to action, you are wasting the time of the busy entrepreneurs."***
>
> Start-up expert

- **1 + 1 = 3:** Several interviewees across the Nordics suggested a need for joint funding calls or programs specifically targeted at Nordic travel and tourism startups to eradicate the difficulties small companies face in accessing more bureaucratic and competitive EU funds. The "Nordic Tourism Policy Analysis" (Nordic Council of Ministers, 2019) also highlighted the importance of financial support for business innovation and competitiveness in the tourism sector. Collaboration, benchmarking and upskilling efforts are sometimes hindered by a sense of "cooperation competition," as companies vie for similar international markets and investment, leading to reluctance to share knowledge. Despite this, cross-border meetings, peer-to-peer learning and shared best practices through Nordic networks are seen as valuable opportunities to boost digital competence and drive innovation. In conclusion, most interview persons agree that existing cross-Nordic collaboration is sporadic and project-based, lacking continuous, integrated support for widespread upskilling and cohesive funding access.

"The key is to join forces and work together systematically."

RTO employee

- **The lack of long-term financing is often described as an obstacle,** and it is especially challenging due to the seasonal nature of the travel industry. Finding resourceful corporate backers with an appetite for risk-taking, similar to the capital foundations observed in other sectors, is challenging within the Nordic travel industry. Furthermore, there is a lingering "post-pandemic effect," where many companies are still financially vulnerable and waiting for an improved profit margin. Providing only 50% financing on a project is considered insufficient, indicating a need for supplementing of more substantial financial contributions to support initiatives effectively. Acceleration experts we have interviewed also note that startup companies often do not have enough funding to chip in for incubator/accelerator programmes. Some other regions outside the Nordics are successful with funding from the EU, but for many smaller actors, there is a bureaucratic threshold to climb to get applications rolling. Many companies do not even know how to approach this or get started. Without the promise of financial predictability, achieving sustainable development remains difficult.

- **A single Nordic market?** Imagining cross-Nordic collaboration, specifically on tourism innovation, has proven to be a rather hard exercise. Quite a few interviewees praise the close Nordic collaboration when it comes to marketing on long-haul markets and the fruitful interexchange of statistics/data methodology. Other interviewees pointed out that there is room for improvement when it comes to common tourism policies and regulations at a Nordic level, for example, regarding cruise tourism, international booking platforms and/or sustainability. While not directly related to startups and tourism innovation, a more harmonised regulatory and policy environment, combined with fostering cross-Nordic collaborations in general, could indirectly benefit travel-tech companies operating across the Nordic region.

  One interviewee also mentioned the possibility of "skipping the national level" and going directly to the Nordic level for tourism innovation. This perspective suggests that if national efforts are fragmented or lacking, a direct Nordic mandate could be more effective.

RECOMMENDATIONS FOR FUTURE TOURISM INNOVATION

Based on what was generously shared by all stakeholders in the interviews and our observations from reviewing the written sources, we can sum up our recommendations for future initiatives and program designers as follows.

In some cases, the recommendations are fresh out of the box, like "What if we had X..." – in other words, quick ideas and visions for future collaboration. In any case, the recommendations must also be read as Group NAO's reflections and elaborations on the entire material and all sources investigated. They point to somewhat general ideas and approaches, which, in some cases, need to be specified and proven further before implementation.

Here it goes:

- **What might a permanent Nordic Tourism Innovation Platform look like?**
  Stakeholders speculate: What if we created a long-term structure (not just a project-based one) to coordinate, connect and support actors across countries? It might be a dedicated Nordic coordinating hub with staff from different countries, similar to existing clusters in other industries. There is a need for a responsible Nordic driver or facilitator with a clear mandate to identify areas of cooperation, initiate and follow up on cross-national projects and work with national governments and private sector actors. Consider having project managers for larger, long-term projects instead of solely funding external projects, which could provide a more long-term perspective and potentially reduce competition for funding between countries/projects. This foreseeable and continuous support would, in the long run, boost awareness about Nordic innovative (tourism) potentials and further foster cross-Nordic initiatives.

- **Secure accessible funding for SMEs and startups:** This idea from conversations is about designing funding mechanisms tailored to the reality of micro and small tourism businesses – with simplified application processes, higher co-financing rates and longer timeframes. Such initiatives could be joint Nordic travel-tech calls (offering more than 50% funding), or innovation vouchers for local pilots that can be scaled across borders.

- **Develop a shared innovation framework and clear mandates in all countries:** Define what tourism innovation means across the region – and ensure all countries have a clear national priority and mandates that include Nordic collaboration as a goal. Earlier this year, Nordic Innovation in cooperation with Group NAO published *A Nordic Tourism Innovation Guidebook,* which share the learnings from the X-Nordic Travel Contest project focused on tourism innovation in the Nordics. The current challenge is to assure that these learnings are harnessed across the Nordic innovation systems to help align strategy, expectations and approaches across policymaking bodies and agencies. A common purpose in initiatives to facilitate shared understanding and concerted effort on a Nordic level needs to be ensured.

- **Inspiration of policymakers and public agencies on innovation principles:** Following the dissemination efforts suggested above, a few respondents suggest a stronger emphasis on relation-building between all Nordic tourism stakeholders, as they would like to see a deeper understanding of innovation beyond product/business development or marketing. Lighter "innovation bootcamps" for public officials, covering topics like mission-driven innovation, systems thinking and service design, could educate all needed relevant parties in a playful way.

- **Balance competition and collaboration across the region:** Design models that address both the shared vision of Nordic tourism and the competitive dynamics between countries. Thresholds can be lowered by setting up "coopetition labs" (stimulating the "cooperation-competition" dynamic), where countries co-develop solutions (e.g., for sustainability or digital visitor services) while keeping national branding distinct.

- **Strengthen peer-to-peer learning and upskilling across borders:** Enable small- and medium-sized players to connect, learn and experiment together across national lines. The idea of a recurring series of Nordic learning sprints, where destination managers and tourism startups tackle common problems together, appeared across the interviews. Some of these should also be organised in person, which is partly desired among some interviewees but also doable in a sustainable way due to the well-functioning infrastructure and proximity between the Nordic countries. Creating more opportunities for cross-border meetings where tourism service providers and technological providers from different Nordic countries can meet each other can help businesses to see the "bigger picture" beyond their immediate regional partners.

- **Formation of thematic clusters and innovation alliances:** Numerous respondents have called for specialised cross-Nordic networks focusing on shared challenges and opportunities. A practical example could be a Nordic cluster on tourism and AI, or a working group on sustainable cruise tourism policy and innovation. Some established cross-national structures already exist, such as NorReg and AI Opener for Destinations, to mention two, but there likely is space and potential for more.

- **Simplify access to EU and international funding:** Some respondents have problematised accessibility and usage of EU funds and suggest hands-on support to small actors navigating EU applications and international frameworks. Not forgetting national services that might already be in place, one respondent envisions a need for a shared Nordic "EU funding helpdesk" focused on tourism, offering templates, matchmaking and coaching. The Nordics could jointly advance in tourism innovation by achieving more EU funding (based on cross-Nordic applications), also relatively positioning the Nordics stronger in tourism innovation compared to other regions.

- **Use seasonality and place-based needs as innovation triggers:** A classic theme in much of destination development is leveraging off seasons and unique local contexts as assets in testing, adapting and scaling solutions to other destinations. An example could be winter-based innovation pilots in the north; remote hospitality tech tested in Greenland and transferred to rural Finland. Another example could be off-season capacity in coastal destinations used to pilot new forms of regenerative tourism, such as artist residencies, climate retreats and remote work hubs – combining low occupancy periods with new visitor segments and business models. Much of this is already at play at the national level but not structured to create interplay between the countries.

In summary, the recommendations point towards a need for stronger political will to prioritise tourism innovation and cross-Nordic collaboration, backed by dedicated funding mechanisms, structured networking platforms (both physical and digital), and a focus on common policy areas. The emphasis is on practical, value-adding initiatives that leverage existing structures while facilitating new connections, reducing bureaucracy and addressing the specific challenges faced by tourism businesses and startups in the Nordic region.

Photo: Daniel Byström Silfver / Design Nation

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3. Asta Kristin Sigurjonsdóttir, CEO, Iceland Tourism Cluster
4. Audun Pettersen, Avdelingsleder reiselivsutvikling, Innovation Norway
5. Berglind Hallgrímsdóttir, Senior Advisor, Nordic Council of Ministers
6. Christian Keldsen, Managing Director, Grønlands Erhverv
7. Hanna Muoniovaara, Manager – Supplier Cooperation, Business Finland
8. Heidi K. Dahl Larsen, Head of Secretariat, Hub for Innovation in Tourism (HIT), Dansk Kyst- og Naturturisme
9. Heikki Uusi-Honko, Chief Advisor, Business Finland
10. Heléne Östberg, Varumärkes- och innovationschef, Visit Skåne
11. Jakob Christian Ipland, Head of Business Development, Wonderful Copenhagen
12. Jan Sandred, Program Manager, Vinnova
13. Jóhan Pauli Helgason, Development Manager, Visit Faroe Islands
14. Katja Lindholm, Customer Coach & Enterprise Europe Network Adviser, Business Finland
15. Linnea Johansson, Avdelningschef, Näringsavdelningen, Ålands landskapsregering
16. Maria Wiberg, Analyst, The Swedish Agency for Economic and Regional Growth (Tillväxtverket)
17. Per Arne Friestad, Co-founder, Nordic Traveltech Lab

18. Peter Møller Laursen, Seniorkonsulent, Hub for Innovation in Tourism (HIT), konsulent, Dansk Kyst- og Naturturisme

19. Petra Lindberg, Programme Manager, Kurbits

20. Sanna Berg, Project Manager, The Swedish Agency for Economic and Regional Growth (Tillväx-tverket)

21. Sanna Kyyrä, Senior Adviser, Ministry of Economic Affairs and Employment Finland

22. Sóley Heradóttir Hammer, Manager, Hugskotið

23. Stina Algotson, CEO, Besöksnäringens Forsknings- och Utvecklingsfond (BFUF)

24. Sunna Þórðardóttir, Specialist, Department of Tourism, Ministry of Industries and Innovation Iceland

25. Susanna Markkola, Manager, DMO Partnerships, Visit Finland

26. Thomas 'Tyt' Mogensen, CEO, Nalik Ventures

X Nordic Travel Contest

Nordic Innovation

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DESIGN NATION

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