

Documentation of Study visits

within the Quadruple project and

Benchlearning report



Quadruple Helix reports 2011:6

By
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Study visit to Roslagen

Sweden 7-8 March 2011

Study visit to Lääne and Hiiu counties

Estonia 7-9 June 2011

Conclusions and benchlearning

Quadruple Helix Central Baltic is an Interreg IV A project focusing on gender equality, entrepreneurship and ICT innovations. It runs from October 2009 until December 2011 and has eight partners from three countries. The name, Quadruple Helix Central Baltic, derives from the working model where four sectors of society i.e. public authorities, researchers, entrepreneurs and civil society actors, have come together to strengthen the tourism industry in the archipelagos of the Central Baltic Sea area. From preliminary research, the roles of the different societal sectors in the innovation system has been identified as follows (Lindberg et al, 2010):

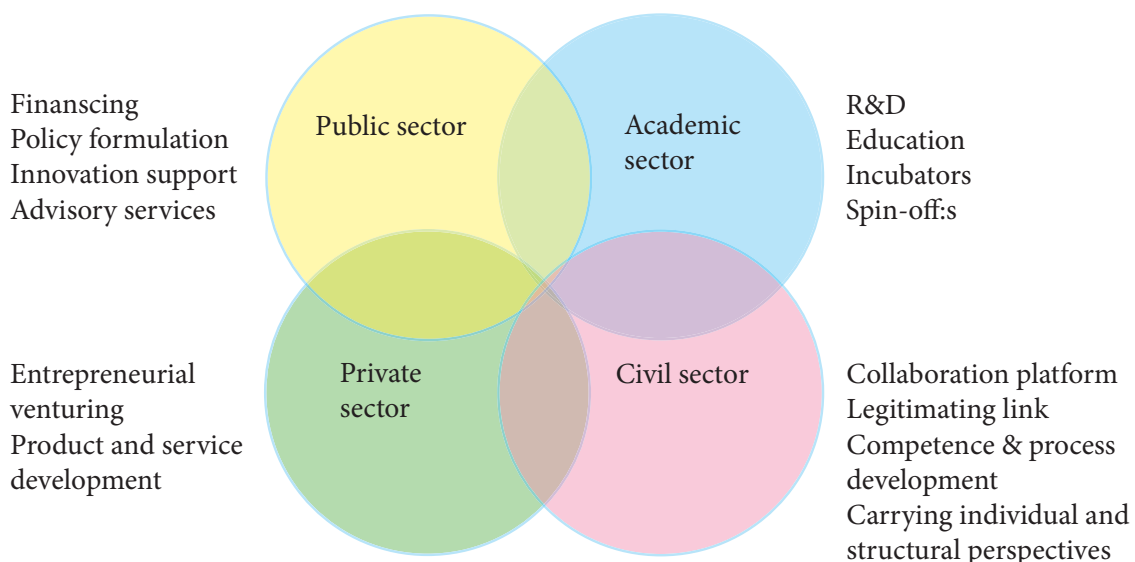


Illustration 1: A Quadruple Helix innovation system

The project is funded by the Central Baltic INTERREG IV-A Programme 2007-2013.

Quadruple Helix Central Baltic experiments with interesting investments in mobile technologies and promote collaboration across borders. It seeks the answer to questions like: How do we focus on entrepreneurship, innovation and clusters in a more gender equal way? And by doing so, what can be gained in terms of development, increased prosperity and innovation? The overall aim defined for Quadruple is to stimulate clusters in the tourist sector in the Central Baltic sea region in parallel with development of innovation support measures and implementation of methodologies for gender mainstreaming in cluster processes. Quadruple combines activities targeting entrepreneurs in the tourist sector with activities targeting, tourist and business promoters and policy makers.

Study visits, seminar and benchlearning analysis

In the beginning of March the project organised a cross border Study visit for the project group and members of the so called Multi Actor Partnerships (MAPs). The MAPs are representatives from the four helixes; public sector, private sector, academia and NGO's. It functions as a target group, who gives feedback on project work and as an important carrier of the Quadruple result when the project is over. The program of this two day event included a seminar, workshop, several project meetings as well as discussions about business support structures and cluster building with local business advice centres and tourism organisations. The event was transnational and gathered representatives from all of the project regions; Estonia, Finland and Sweden.

To follow up the topics discussed during the Study visit and seminar in Sweden another study trip with workshops was organised in West Estonia early June 2011. This event focused on local and cross border tourism clusters and how to create gender equal business support on a local level.

This paper documents these two study visits and the seminar and workshops that took place within the program. It also includes a benchlearning report based on the discussions and conclusions drawn in the MAPs and Partnership groups. The aim of the study visits was to learn from each other, create awareness and identify good practises, ie benchlearning. The Benchlearning report summaries this process.

1. Study visit program 7-8 March 2011

Monday 7th of March

Seminar and project meetings

Venue: Norrtälje municipality building, Norrtäljesalen

08:30 - 09:00 – Welcome

Sofia Händel, Project Manager Quadruple.

09.00 – 12.30 Seminar: New ways of supporting entrepreneurship

Monica Lindgren and Johann Packendorff

14:15 – 16:30 Partnership meeting

17.00- 18.30 Steering Group meeting

Tuesday the 8th of March

Study visits and meetings

8:30 – 9:30 Study visit at Coompanion

Bridget Wedberg

Presentation of Coompanion - business advisors for social entrepreneurship, cooperatives. Place: Coompanions' office

10:15 - 11:30 Företagarna and Nyföretagarcentrum

Lena Norrman

“The Enterprise association” and “Start up business centre”.

Place: Norrtäljesalen, the Municipality building

13.00 -14: 30 Destination Roslagen

Gisela Norén, Margareta Schultzberg

Presentation of Destination Roslagen, discussions on cooperation and networking in the tourism sector. Place: The Tourist information centre in Norrtälje.

16:00 – 19:30 Ljusterö Skärgårdscenter

Ljusterö Skärgårdscenter is a museum and tourist information centre run by e-team member Yvonne Skanlert-Werner.

16:00 – Presentation of Ljusterö skärgårdscenter

Yvonne Skanlert-Werner

16:30 – Regional development and local cooperation on the island Ljusterö

Carl Andreasson, Ljusterö företagarförening

1.2 Seminar: New ways of supporting entrepreneurship

Welcome and opening of the meeting

The meeting was opened by the project manager Sofia Händel who gave a brief of Quadruple Helix and its three themes; Gender & entrepreneurship; Initiating networks of tourism SME's; and developing tourist services for mobile phones. Sofia explained that apart from reviewing how the project work is progressing within the three themes, the meeting will focus on exchange of experiences regarding small scale entrepreneurship and gender aspects. The programme for the meeting includes a seminar by Johann Packendorff and Monica Lindgren from KTH, a workshop session, Partnership and Steering Group meetings and study visits to a selection of local business advice and tourism organisations.

Sofia underlined the need of using ICT and mobile services in the tourist sector. This is supported by a study undertaken at Åbo Akademi University involving a needs assessment analysing what ICT needs there are within the tourist sector. A practical example of how ICT is used within Quadruple Helix was also mentioned, i.e. the case of a mobile application for a digitally available bicycle route which the group of tourism entrepreneurs in the Roslagen network (E-team) is focusing on right now.

Presentation of the participants

All participants introduced themselves where after Sofia Händel introduced entrepreneurship researcher Johann Packendorff from KTH.

Seminar: New ways of supporting entrepreneurship - Johann Packendorff & Monica Lindgren

Johann Packendorffs presentation focused on how to use Quadruple Helix as a base to see what relations that exist between the projects different focus areas.



Summary of the seminar:

Indicator model – Gender gap

Johann started by reviewing recent reports from Sweden, Finland and Estonia comparing similarities and differences in terms of gender aspects and statistics on e.g. employment rates, pay gaps, amount of women engaged in different sectors etc. The presented figures are quite new since it is only recently that statistics have become available on women and entrepreneurship (in the 90's). More detailed information about the statistics is found in Quadruple Helix reports 2010:5.

The gender gap in entrepreneurship seems to be similar in all three countries, since the inclination and prevalence of entrepreneurship shows that men are twice as likely to

engage in entrepreneurial activities, meaning that only around 1/3 of entrepreneurship activities are carried out by women. At the same time, different levels of entrepreneurial activities overall can be identified in the countries, whereas for example in Finland both women and men are twice as likely to engage in entrepreneurial activities as compared to Sweden.

There are also differences in the opportunity/necessity ratio; where most people in the participating countries engage in entrepreneurial activities due to opportunistic reasons rather than due to necessity. But once entrepreneurial activities are carried out of necessity it is generally done by women.

Reasons for gender gaps

- Women work more out of necessity
- Entrepreneurship is generally considered to be male dominated
- Women's entrepreneurship is not valued as high as activities performed by men – there is less usage of venture capital
- Women tend more often to integrate entrepreneurship with family life
- Men has wider networks while women focus on local networks
- In general it is easier for men to create their own firm. Men also receive more trust/support than women in starting up a business even though the standard way of gaining income is through a traditional employment.

However, Monica Lindgren mentions that there is no proof that men are more creative than women. Both genders are equally creative. It is more a matter of society perceptions and choice of sector that affect the gender gaps. In order to change traditional gender patterns a redefinition of innovation systems would be necessary.

Innovation systems

Innovation systems are a platform where actors from different societal sectors jointly promotes the creation of innovations, by combining knowledge into new products or services. Innovation systems can be; sectorial, regional, or national depending on if it is a core activity of national interest. Innovation systems should further result in; innovations, economic growth, increased employment and sustained societal structures while maintaining a lively and sustainable city/society character.

A redefinition of innovation systems requires an analysis of the core of the economic, political and organisational structures behind. This is what Quadruple Helix focuses on since it creates a platform for actors from different spheres of society –including civil society-, while promoting innovation and converting knowledge into new goods and services.

The triple helix thinking 'Government- Academia – Industry' (excluding civil society) aims at having the three sectors collaborating, whereby growth will be stimulated. All spheres of governments (national, regional and local) may engage and be responsible for policy formulation, innovation support and provision of advisory services. In Sweden for example there are several governmental agencies that promote collaboration between e.g. academia and industry by providing funds.

Problems with innovation systems

- SMEs are often not enough growth oriented
- SMEs are often outside established innovation systems, at the same time as the SMEs have a great employment potential
- SMEs have less possibilities and opportunities to initiate innovation and to create collaboration between other helixes
- There are already well functioning innovation systems in large corporations that are technology intense and big business-dominated (hard to change).

The above is especially true for marginalised entrepreneurship activities performed by women and ethnic minorities regarding services, rural areas, breadwinning oriented and survival oriented firms.

In addition, government support mainly goes to innovation systems and investments in the capital intense hard core industry and centres of excellence which are male dominated.

Women dominate in services and experience industries that receive only 20% of the government funds, while the male dominated sectors grab the other 80%.

Contributions possible to be enabled by the 4th Helix

The 4th Helix - civil society including NGOs* – makes out a fourth group apart from the ‘Government- Academia – Industry’, and is an attempt to respond to the above mentioned challenges posed to SMEs and especially those managed by women.

* Different Civil Society Organisations may be: NGOs, IGOs, Quasi NGOs, Government organised NGOs.

The 4th Helix is expected to make out a link between all four Helixes and function as a platform for inter-firm networks; for project and business collaborations; and for process innovations, while making out an incubator for embryonic clusters (if somebody has an idea, the NGO may be the place where entrepreneurs may affiliate with others in a similar situation). The 4th Helix may also contribute by broadcasting individual perspectives while recognising individual and structural levels, and not only projects and firms. It may organise marginalised companies, bring up unique competence, and make female participation in male branded entrepreneurship visible. The 4th Helix is further a collaboration platform bonding the society together, legitimizing the link between competence and process development and it may facilitate SMEs to enter into greater innovation systems.

Challenges for the 4th Helix

There are however several challenges for the 4th Helix;

It often operates through non-formalised contexts which brings legitimacy problems (not always taken seriously) and evokes fears of competence among extant actors.

Many activities are sorted under short lived projects; meaning short term financing v-s long term change needs and organisational continuity.

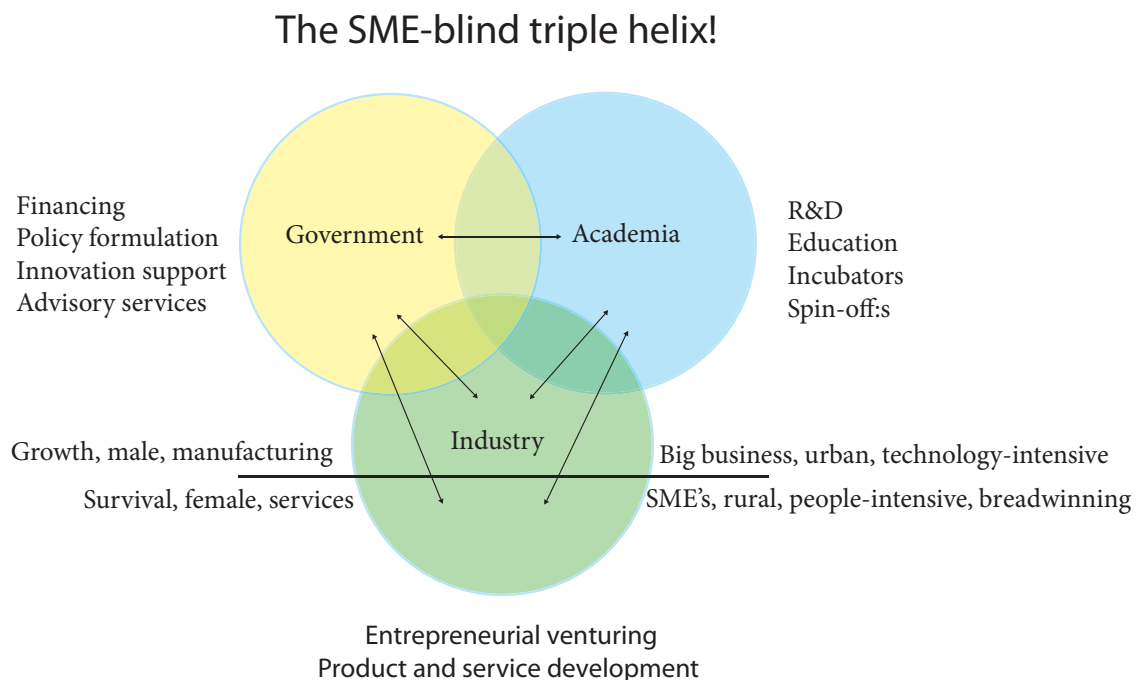
Collaboration with the academic sector is not enough developed and there is often a lack of extensive networks. Female organisations/organisations with a traditional “female agenda” are moreover unfortunately often subject to detailed scrutiny.

1.3 Workshop summary

Moderators: Monica Lindgren and Johann Packendorff

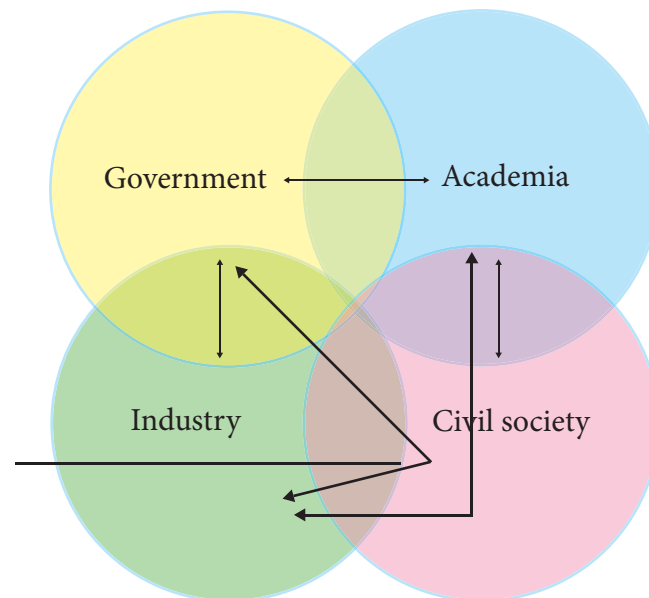
Workshop participants: 20 representatives of government organizations (local and regional), universities, private business firms and non-governmental organizations. Both men and women of Estonian, Finnish and Swedish nationality.

Point of departure: Traditional Triple Helix models are blind to SMEs:



Intended solution: The addition of a 4th helix, the civil society as manifested in non-governmental organizations, as a way to overcome SME-blindness:

Towards a quadruple helix logic



Civil society organisations as a way of overcoming the SME-blindness of traditional innovation systems?

Main questions to the workshop (from the SME perspective):

1. Current relations with the government? 5 main relations!
2. What can be improved in relation to government? 5 suggestions
3. Current relations with Academia? 5 main relations!
4. What can be improved in relation to Academia? 5 suggestions
5. Current relations with industry (other companies)? 5 main relations
6. What can be improved in relation to other companies? 5 suggestions
7. Current relations with civil society organisations? 5 main relations
8. What can be improved in relation to civil society organisations? 5 suggestions

Workshop results:

1. Current relations with the government

- * Relations are very much limited to following government rules and regulations that are limiting rather than enabling
- * SMEs are mostly connected to local and regional governments (In Sweden often through regional boards)
- * SME often meet govt through advisory services - good
- * Tourism info bureaus important, getting privatized now with opportunity for co-ownership by tourist entrepreneurs
- * Govt often appearing on local level through food and health inspections and regulations that are hard to handle for SMEs. Many contacts through inspection systems rather than through business supporting systems.

- * Good when government sustain websites and things like that. New entrepreneurs can be introduced to the local community and local advisors.
- * Local government do not always understand conditions for business.

2. Improving relationships to government

- * Local govt needs training in entrepreneurship and conditions for running businesses. Needs to understand business better
- * Govt needs to simplify things for SMEs
- * NGOs needed to enhance the relation, not least as they often have political background or experience
- * If SMEs would find ways to organise in larger clusters and organise in umbrella set-ups they would have a greater impact and greater possibility to improve conditions
- * SMEs should familiarise with ongoing activities in the region and current local development possibilities (including infrastructure developments), in order to connect with these and gain new ground
- * Ally with strong financial actors
- * An SME will often have to work against several different authorities, no single contact point. Single contact points an area of improvement.

3 Relations to Academia

- * Not too extensive.
- * The academic sector is complicated and bureaucratic, it does not allow for much individual creativity wherefore many academic specialists branch off from academia to start their private firms, but with lacking entrepreneurial skills.
- * Academic entrepreneurship a good combination of research and business, but academicians not always business-oriented
- * Research not always used. And when used, it has become obsolete. Who updates research? Who pays for the updates?

4 Improving relations to Academia

- * Entrepreneurial training to academic specialists should be carried out by umbrella associations/NGOs
- * Create meeting points and platforms for representatives from Academia and SMEs to meet
- * Create clusters and invite academia to meeting and development sessions
- * Broaden the view of “Academia” in innovation system models. Sometimes you need pathbreaking research, sometimes just the state of established knowledge, sometimes just vocational training.
- * NGOs can fulfill a link function and platform. Example with horse cluster.
- * SMEs must ask the right questions in the right way – which they can not always do. Sometimes they need info, not research. Important to find the right persons and specialists.
- * Tourism research much needed. Trends and customer needs.
- * Expensive to buy research. Local governments could do that, not SMEs or NGOs.

5 Relations to other companies in Industry

- * Norrtälje: cooperation perceived as profitable. Estonia: competition, rivalry and secrecy the natural way to deal with other companies.
- * Often male dominated, while the industry sector has more possibilities than others for female entrepreneurs
- * Tourism: Many possibilities exist in relation to e.g. places where excavation of natural resources has ended; where you may familiarise with old traditional income generating activities, farming practices, production entities etc.
- * Gvt limits SMEs in terms of creating complicated regulations for establishment of food related businesses, building permits and other permissions.
- * Wine production is an example where gvt puts strict conditions for SME that pretty much define if SME may be successful or not.
- * Rivalry – the example of the hotels that could not see the point of helping kayaking firms out as they thought they would lose customers
- * Community kitchen example – small food producers using a common kitchen and taking on government regulations and inspections together. Raises questions on who shall be let in, trusting that everyone keep up the standards.
- * We do not know what the best practices for clustering are

6 Improving relations to other companies in Industry

- * SMEs should identify what people are willing to pay for, visiting historic developments, current construction developments, production of specific brands where you may learn about ongoing activities. Feasible to combine learning of history with modern life.
- * Wine testing from local producers
- * Collaborate with others through umbrella organisations.
- * Co-branding and umbrella organizations the next steps-
- * SMEs do not always know who is out there to collaborate with – must take the initiative and look for themselves
- * Study visits – get inspiration from each other in a practical way

7 Relations to civil society organizations

- * Many funders require that you are part of networks and CCOs, in order to receive funds. Membership a legitimacy factor enabling successful funding applications.
- * Sharing beliefs and common values important.
- * NGOs working well in certain sectors in the three project countries.
- * Examples of underutilized NGOs, networking without a common cause or action agenda
- * Facebook as social media involving both firms, NGOs and customers (tourism customers use private life-oriented social media, not professional). Example: Skön Skärgård.

8 Improving relations to civil society organizations

- * Important to increase connections with others through promotion
- * Familiar with modern ICT and digital is fundamental

- * Forums and networks like Facebook may be highly important for many SMEs
- * Common websites
- * Cooperation in Estonia sometimes hard to organize, good to see role models in other countries, we need to look across borders sometimes to find the best examples



1.4 Study visits

In order to exchange knowledge and discuss how the business support structure looks in Sweden and locally in Norrtälje Municipality we visited the local branches of Coompanion and Nyföretagarcentrum.

Nyföretagarcentrum

Lena Norrman Nyföretagarcentrum - “business start up centre”

Lena Norrman is one of the advisors working at the NGO Nyföretagarcentrum (NFC) in Norrtälje. She presented the organisation and how it is working both nationally and locally. NFC Sweden started 1985 in Stockholm and its main task is to stimulate persons to start up “healthy” companies. NFC is Sweden’s largest actor with nearly 100 business centres all over Sweden.

NFC in figures:

- Network with 5.000 persons and 2.500 partners and stakeholders.
- Nearly 15.000 persons get advises every year.

- 10.000 start-ups every year.
- 80% healthy companies after 3 years who creates taxes of 3 billion SEK every year.
- 0,67% has shut down after 3 years.

Lena Norrmann explains that NFC is not a state body like for instance ALMI, instead it is funded by their members and donations. Municipality of Norrtälje and the local bank Roslagens Sparbank are big contributors. NFC Sweden works as a services centre.

- They help us with material, IT-systems, fairs, marketing, contact with national stakeholders and contact with the Government. NFC Sweden also educates all local advisors and has the responsibility to keep up the quality of every centre in Sweden, Lena says.

NFC offers:

- Advices free of charge
- Free visits 2 years before starting up and 3 years after
- A very big local network with other companies and contacts
- A lot of material and tools also free of charge

NFC Norrtälje

- Started in 2008 (the work started 2 years earlier)
- 2 business advisors and a local board
- A very, very big network of stake-holders, mentors and supporters
- Approx. 500 persons have visited since -08 and 50% of these has started-up.
- We have 41 members/stakeholders and they support us with approx. 400.000 SEK/year

Lena Norrman concludes that their main goal is to create a better entrepreneurial climate in Norrtälje and help more companies to start-up.

Questions from the audience:

Any difference between women and male entrepreneurs?– Not in general terms, but one can see a variety in what type of branch they choose to start in. Also women tend to be more careful initially, starting up in a small scale. However it seems like women owned business lives longer and are more successful in the longevity sense.

What are the typical challenges for new entrepreneurs? – I suppose it is the same for everyone and that is to actually find the market. Find the customers. Then to set the right price for the service or product, find the balance neither being too cheap or expensive.

Any general advice? - Write a proper business plan. Really take your time and write it down. And be realistic; scrutinize the idea and estimated quota of what you sell. Then you see early if it is possible and avoid disappointment. On the other hand some new starters can be too careful which can prevent the enterprise from reaching its full potential. It is here the business advisor comes in and can assist in determining whether to push or to hold back.



Destination Roslagen

Presentation of Destination Roslagen, discussions on cooperation and networking in the tourism sector. Gisela Norén, Margareta Schultzberg

Place: The Tourist information centre in Norrtälje.

We started with having a look at the new premises of the Tourist Information Centre in Norrtälje. Then the head of Destination Roslagen, Gisela Norén, presented the organisation. Destination Roslagen is a municipal cooperation between Norrtälje, Vaxholm, Österaåker and Östhammar. The municipalities have joined under the same headline, Roslagen, doing common marketing, web, brochures etc. Each municipality is responsible for its tourist information centres, but Destination Roslagen coordinates their work. Gisela is actually the only employee of Destination Roslagen. The area is dominated by summer cottages and people having a summer home here is the main tourist. Among the incoming visitors Germans, British and Dutch people are most frequent.

Gisela made a thorough description of the area, however it is not rendered in this report which instead focus on the general dialogue:

The current focus for Roslagen is to develop a new web page with online booking. Quadruple and Destination Roslagen have a fruitful cooperation and the project is borrowing the roslagen.se database for the mobile application. A discussion followed about the new web and the fact that it initially will only exist in Swedish and partly in English, since there are not enough resources to make proper translations straight away. The group reflected upon the fact that tourism organisations generally lacks funding and that it is unfortunate that a homepage in various languages cannot be prioritised. The tourism people agreed that it is difficult not being able to do many relevant things for the development of a destination due to lack of finances.

The talk proceeded and the group discussed that project partner Läänemaa Tourism and Destination Roslagen are organised in different ways, where LTM is a NGO funded by its members; entrepreneurs, municipalities and the Lääne county where Destination Roslagen is more of a loose cooperation between four municipalities.

The group concluded that Estonia in general is more export mature and more ready to accustom foreign visitors'. For example most web pages are multi lingual and menus at many restaurants are translated into at least English and Russian.

Regional development and local cooperation on the island Ljusterö

Carl Andreasson, Ljusterö företagarförening

At Ljusterö Skärgårdscenter, which is an art museum and Tourist Information Centre, run by E-team member Yvonne Skanlert-Werner the group listened to a speech by Carl Andreasson in the Ljusterö Companies Association.

- Members: Companies on Ljusterö and surrounding islands
- Abt 120 associated companies
- 20% increase in membership over 3 years
- Largest section is construction companies
- Our goal is 150 members 2015

Vision:

- Increase the permanent population from about 2 500 today to 5 000 in 2020
- 1,5 hours from Stockholm and Arlanda airport
- Large demand for services in building, construction and building maintenance
- Large potential in tourism and visitor services

Mission

- To support existing and new companies
- To enhance the cooperation between our members
- To secure our members interest towards public authorities
- To create marketing platforms for and support the marketing of our members
- To secure a good cooperation with other associations within our territory
- To assist with training and education on demand

Marketing

- Free annual catalogue 5 000 copies distributed to all inhabitants on Ljusterö and surrounding islands
- Free map over Ljusterö and the archipelago
- Boards and posters over Ljusterö and the archipelago
- Web portal for Ljusterö
- Annual company fair

Infrastructure

- Maintained and increased local public and private service
- Improved Internet access and distribution

- Public water and sewage
- Improved public transportation
- Development of roads, public parking and marinas

Tourism

- Development hotels, hostels, caravan and camping sites, B&B
- Development of marinas
- Improved services plus new events and attractions for visitors

Discussion:

The audience were impressed by the work and scope of the association. What did start as an organization for enterprises dealing with enterprise related things have evolved to a regional development movement. The fact that it was the association's members that created the company who built and own the Ljusterö Square with shops and office facilities and also are engaged in the quality of the public school, shows the wide spectra of the organization. It seems like Ljusterö Företagarförening is a good example of how people and actors can work together.

One reflection from the Hiiumaa representatives is that Ljusterö and Hiiumaa shares many similarities such as dependence of a functioning ferry connection, an interest in increasing the all year around population etc. But according to the Estonian parties the enterprises on Hiiumaa could learn a lot from Ljusterö on how one can work together, cooperate, both to enhance business and develop the society.

2. Study visit report

7-8 June 2011 - Estonia

A Swedish delegation involved in the Quadruple project via Municipality of Norrtälje visited the project partners Läänemaa Tourism and Eurohouse NGO for a two day study visit in June 2011. First day concerned tourism cluster building in the Lääne area and second day how to promote women's entrepreneurship and create gender equal business support structures on Hiiumaa. Here follows a summary of the content, conclusions and measures that resulted from the two separate workshops:

2.1 . Cluster seminar

Haapsalu, 7 June

Läänemaa Tourism Association is the responsible partner of the networking and team-building part of the Quadruple project in Estonia. Meaning this tourism NGO is coordinating the work in the Entrepreneurial Team (E-team) and leads the cluster process.

Läänemaa Tourism Association has arranged a series of seminars to enhance cooperation among involved actors and by this strengthen the tourism cluster in West Estonia. 6-7 of June a seminar with entrepreneurs and stakeholders such as the Haapsalu Municipality, Lääne County, Lääne Development Centre and West Estonia Tourism Centre was arranged. The Swedish group took part during the second day.

The two working groups MAPs and E-team had started to analyse the Läänemaa area on previous occasions and the result was discussed:



2.2 Läänemaa cluster SWOT analysis result:

Merits of Läänemaa

- * Seaside location
- * Closeness to the capital city Tallinn, 1 hour by car
- * Tourist attractions distinguishing Läänemaa from the rest of the Estonia(the sea, Matsalu Nature Reserve, Estonian Swedes and their cultural heritage, Osmussaar, Vormsi, Nõva beaches, Haapsalu with its sites and old town)
- * Well developed county centre with its numerous attractive events and tourist attractions (Haapsalu Bishop's Castle and White Lady, old town, railway station, Ilon's Wonderland etc.)
- * Effective umbrella organisation Läänemaa Tourism and its members: local authorities and several tourist establishments
- * Marketing Läänemaa as a tourist destination has been systematic and consistent (so far mostly based on tourism fairs, various publications, Internet marketing, social networks, mapping). Marketing of bigger ventures has been rather consistent and successful (e.g. SPAs; bird-watching)
- * Natural environment is protected (valuable and in good state); beauty spots (RMK recreational areas and health trails); organised nature holidays (Nõva, Matsalu, Vormsi). Several nature spots but only partly prepared for receiving visitors (weakness)
- * Bird-watching conditions well developed in the county thus applied the primary potential of Matsalu as one of the best bird-watching sites in Europe. Observations of various associations in Haapsalu has been created as well

- * Good reputation and image in organising cultural, nature tourism and other events; Haapsalu as a well-known sea resort

Weaknesses

- * Product development is inadequate (both on county and enterprise level). Uneven cooperation in product development and marketing (particularly what concerns accommodation and catering establishments). Cooperation of bigger enterprises is more efficient
- * Insufficient cooperation of bigger enterprises in new target markets, in Tallinn and farther resellers or agents (tourist establishments, event managers). Smaller enterprises almost never use any agents at all
- * Accommodation, catering and other services – not enough accommodations for bigger groups
- * Marketing activities are not systematic in all the markets; new markets and products are not used (e.g. cultural tourism as a whole; Lihula as a provider of cultural and historic heritage is insufficiently used)
- * Insufficient (transport) connection (buses, no train connection) with other bigger centres (Riga, Pärnu, Kuressaar) but Tallinn; bad state of coastal roads. Options: car-rent, bike rent
- * Shortage of market centered know-how and weakness of analysis. Official tourist statistics is inadequate for thorough analysis and decision making; lack of local research
- * County tourist information is available in the Internet but the channels need updating (e.g. directing information from puhka.eestis.ee in order to combine nation wide tourist information; developing westest.ee)
- * Lack of cross county tourist information network (incl unitary arrangement of signposts and information boards) Project based development of signpost system
- * Lack of active services off-season period – in autumn, winter and spring
- * Development activities are project and arrangement based
- * Inconsistent service quality
- * Lack of guides providing services in various foreign languages

2.3 Product analysis

There are five different tourist product themes: cultural - and historic heritage, nature tourism, relaxation and health tourism, active vacation and events.

EAS (Enterprise Estonia) has cultivated the following cross Estonian tourist products: cultural tourism, city holidays, nature tourism and health tourism.

Cultural- and historic heritage product

- strongholds (Haapsalu, Lihula, Virtsu vassal stronghold, Koluvere, hillforts e.g. Vatla) mansions, prehistoric burial mounds, churches and chapels, village environment, Estonian Swedes cultural heritage (Noarootsi, Vormsi), Haapsalu old town and wooden architecture (incl wooden lace), Haapsalu railway station, museums, galleries (Okas,

Wikland, Kokamägi), Saueaugu theatre farm. In perspective observation of military objects and services located there (presenting contemporary history), lighthouses, thatched roofs and stone fences, Jaala(boat) promenade, imperial resort
- in addition e.g. Haapsalu scarf both as a tourist attraction and a souvenir; legends; local cuisine

Customer: domestic and foreign visitor

Main foreign markets: Finnish, Swedish, Russian, Germans, Latvians

- small groups: families, fellowships, tourists with special interests
- big groups: schools, tourist groups, conference tourists, corporate groups



Health and relaxation tourism product

- The present product is based on two SPA establishments of Haapsalu (Laine and Fra Mare). In addition Haapsalu Neurological Rehabilitation Centre , Polli Talu Arts Centre and Haapsalu Water Centre
- Algallika Guesthouse – yoga and Chinese alternative Medicine Centre; Läänemaa Health Trail (53 km in Läänemaa); Palivere, Kullamaa and Lihula nature trails
- Paralepa park forest with its trails
- Hipotherapy in Ridala (riding stable)
- Beach holidays (swimmingareas) – 2 official beaches in Läänemaa

Customer: in low season - Estonians, Finnish, Russian, Danish

Distribution of visitors: relaxation and health tourist, corporate customer, holidaymakers (beach holidays)

Domestic tourist: 1) Relaxation and health tourist, 2) Corporate customer, 3) Families and fellowships, 4) Groups of special interests

Active holidays and sports tourism

- Sports facilities; tennis courts; golf courses; horse riding; fishing, hunting, surfing, ice-boating; sports grounds, tourism farms offering various popular sports services; hiking trails, sports events.

Event products

- Variety of events taking place in Haapsalu and Läänemaa e.g. White Lady Festival, Augustblues; American Beauty Car Show, Haapsalu Horror and Fantasy Film Festival; Peraküla Village Days; Haapsalu Scarf Festival; Olaf's Festival in Vormsi etc.

Above mentioned product has barely attracted foreign market. The growth in foreign market might cause the decrease of quality. The product is mainly consumed by Estonians, mostly by visitors from Tallinn. Every event has its own customers with different background. Cultural events of Läänemaa do not attract foreign visitors but increase the attractiveness of the whole region. However, some events (American Beauty Car Show, August blues) can attract foreign visitors as well.

Events carry significant marketing effect for the whole county as the county gets "free" advertising by media

Nature tourism product

The product involves services which enable partaking in natural attractions: bird-watching (incl. in Haapsalu); botanic tours, bog - and marsh trips, nature educational tours. As objects Nõva coastal forests and holidays can be considered as well as Osmussare, Vormsi, Silma -and Matsalu reserves; Marimetsa bog, Salevere Salumägi. The product also involves Matsalu Nature Film Festival.

The potential is moderately big as Läänemaa nature is well preserved and interesting and this is being highly valued by the tourists. For example, Matsalu is one of the best bird-watching regions in Europe and bird-watching as tourism is growing world-wide.. Unfortunately, Matsalu is underused as a bird-watching region.

The main customer is generally domestic tourist (students and teachers visiting educational trails). The potential of foreign visitors is bigger in what concerns specific products, e.g. bird-watching and botanic tours.

2.4 Group Discussion

Topics

1. Would the above mentioned products attract Swedes?
2. What could be the main cooperation field? May be within some specific product? How to find good agents in Sweden? How to direct groups to Sweden and vice a versa?
3. Who could be the main cooperation partners? Could they be travel agencies or some other organisations like biking, bird-watching or hobby artists' societies?
4. How to find those societies? How to map those contacts which could be communicated at once in order to plan common activities?

5. What is your main interests, aims of cooperation? What could be the joining link or common projects for Swedish visitors?

The result of the discussion is summarised under headlines.

Cooperation and Networking

Discussion about the importance of creating packages since it is easy to book in advance for foreign tourists, but it is also an important incentive to make entrepreneurs cooperate more with each other. Discussion around collaboration based on themes, activities such as local food trips, bicycle packages, Health weekends etcetera (activities, transport, accommodation). Suggestion that it might be easier to form strong cooperation networks if the parties unite under “the same umbrella” and have something concrete to build upon. Then the entrepreneurs can share marketing costs, be more visible together.

Attention and contacts in the Swedish market

Generally it is tough to reach through to the Swedish customers with traditional advertising. It is expensive and might give little revenue back to small actors. Instead the Swedish group recommend “article based attention” meaning: to appear in written texts in journal and magazines (travel and experience articles).

Products and target groups

Discussion continued on the theme how to reach through to the customers and agreed that people with special interests/sub cultures are strong target groups (example bird watchers, fishers, motor enthusiasts – you name it). To all identified themes one can connect suitable target groups and visitors with special interests.

In a Swedish perspective much can be gained by reaching these groups and associations directly. It can be done through “special interest magazines”, forum/communities on Internet etc.

Swedish target groups:

Nature tourism: Fishers, hunters, bird watchers

Health and culture tourism: Retirement associations, clubs, organisations, fellowships

Sports and active tourism: Training camps, sports clubs, companies organising training camps for athletes.

Measures

Sofia Händel will find contact details to:

- * Swedish newspapers and magazines doing travel articles
- * Magazines and communities for fishers, hunters, bird watchers etc (theme: Nature Tourism.
- * Retirement associations and societies
- * Training camp organisers/travel agents

Addresses will be forwarded to Läänemaa Tourism who then can contact the various target groups with tailor made suggestions.



3. Workshop “Promoting women entrepreneurship”

Kärdla, 8 June

The meeting started with an initial discussion about the conditions for women entrepreneurs on Hiiumaa and how the business support is structured. Then a type of SWOT analysis was conducted to identify measures for the future. Based on the SWOT analysis the participants agreed upon measures and actions for the future.

3.1 Discussion about general conditions

How can we get more women entrepreneurs? We started with identifying the existing business support structure on Hiiumaa.

On Hiiumaa the Foundation Tuuru is functioning as an Enterprise Development Centre (EDC) with training and language courses for instance. Tuuru is a branch of Enterprise Estonia. The Foundation has a social mission and deals with people who are unemployed and conducts labour market training to improve skills or knowledge in needed areas. They also organise business and marketing courses and project implementation. Some courses and business advice are project based.

Tuuru is financed by earmarked money from the state (Enterprise Estonia) and from the local municipalities Kõrgessaare, Käina, Emmaste, Pyhalepa and Kärdla.

The courses organised are mostly free of charge. For instance Business development consultations where the first 4 hours are free then the entrepreneur pay the following hours.

Business start up – Some support exists, for instance start money of maximum 10 000 € where 5000 € comes from the unemployment office and then 5000 € from the EDC. The money are conditioned and to get it one needs to formulate an approved business plan and here many enterprises fail. In reality this support is not so commonly used. Tuuru organises courses in how to write a business plan, though.

Find a market - A general difficulty is how to find a market and many new entrepreneurs must work multifunctional, ie have a diversity of services in the enterprise or have an ordinary job on the side.

Hiiumaa has 9000 inhabitants and the local market is small. Among these 9000 persons about 400 are self employed and about 300 works for NGOs. About 1/3 of the entrepreneurs are women. The public sector employs the most, and then comes the plastic industry and tourism including transport and accommodation.

It exist an Entrepreneur association, but out of 30 members there is only one woman. Women entrepreneurs and professionals have started a club though, it is growing and the aim is that it can be a part in the local business life in the future.



3.2 SWOT analysis

Result Group 1

<p>Strengths</p> <ul style="list-style-type: none"> * Insularity * Pure nature * Unlimited data service * Low labour turnover * Free availability of labour resources * A wide community of handcraft and creative people in the community * Logistics takes into account the existing conditions of insularity * Lehtma harbour as an economic area close to Kärddla town * Kärddla harbour good location in nature * Safe environment 	<p>Weaknesses</p> <ul style="list-style-type: none"> * Small community * Power supply dependence of the cable * Lower purchase power per household than average in Estonia * Lack of equity for investments * Lack of skilled workers and possibilities for training * Low competitiveness in attracting foreign investments * Underestimating the importance of marketing, branding and insufficient awareness of tourism sector economy * Lack of suitable high-quality rental office and business space
<p>Opportunities</p> <ul style="list-style-type: none"> * Nordic countries neighbourhood * Developing the export oriented, based on local resources small-scale production and distant working * Tourism Product Marketing, the quality of preservation and development, marketing and image building activities * Finding businessmen who care for Hiiumaa development and cooperation for finding investments * Constructing harbours and developing harbours areas * Creating the conditions for using the supportive measures for young families to return to the island * The development of stable and regular links * Valuing success stories * Creative Industries Development 	<p>Threats</p> <ul style="list-style-type: none"> * Diminishing population * State regional policy does not provide sufficient support for the development of the region * Worsening conditions in getting public services at lace * Continuous negative information in the media * Less security * Ongoing big development project with major impact to nature

Measures to be implemented

- * Participation in Hiiumaa common marketing
- * Develop the environment that support entrepreneurship
- * Development of harbour areas
- * Increasing the activeness of element (life and working environment)
- * Shaping the usage of land and land planning that support the economic environment

Result Group 2

<p>Strengths</p> <ul style="list-style-type: none"> * High quality of products and services * Small community, everybody knows everybody which gives a good support. * Women have excellent communication skills and are good at networking * Local EDC * Possibility to run development projects 	<p>Weaknesses</p> <ul style="list-style-type: none"> * Lack of spare finances * Lack of venture capital * No local incubator centre * Lack of time (social responsibility – home, family, other activities) * More emotional decision-making * Little money to invest leads to small businesses * Difficult to grow due to small home market * Tourism companies have short season - 2 months.
	<p>Measures</p> <ul style="list-style-type: none"> * Develop a strong organization of women entrepreneurs, which is an equal and significant partner to other Hiiumaa’s organizations * Aim to create an Incubator Centre * Special emphasis on women entrepreneurs in measures and projects. * Business advice and help to start enterprises in diverse sectors - not rely only on a few industries

3.3 Action plan

Based on the SWOT analysis and discussion the group recommend the following actions for more and stronger women owned enterprises and gender equal business support:

- * Create a strong organization of women entrepreneurs, which is an equal and significant partner to other Hiiumaa 's organizations
- * Tourism: Hiiumaa lacks a strong tourism organisation promoting the whole area. The common marketing of Hiiumaa and local cluster must be strengthened. Emphasis shall be put on uniting the tourism entrepreneurs.
- * Develop the environment that will support entrepreneurship; suggestion that Hiiumaa actors work together to establish an Enterprise Incubator.
- * Develop the harbour areas – this will strengthen the tourism industry on the Island.

4. Benchlearning report

4.1 Conclusions and benchlearning analysis:

The benchlearning analysis is based on the discussions and conclusions among the participants of the study visit programme. We have defined benchlearning as a process where one learns from each other; a learning process that develops knowledge, creates awareness and leads to greater regeneration (the definition used by Bengt Karlöf).

Tourism and clustering

Tourism is the globe's biggest business. It brings important income to the Swedish, Finnish and Estonian state. It also plays a key role in the local economy in coastal and archipelago areas such as Roslagen, West Estonia and Åboland. However, locally this branch and the organizations set to promote it suffer from lack of resources. This is vivid after discussion with both Destination Roslagen and Läänemaa Tourism representatives during the meetings in March 2011.

One can reflect upon why this is. ...

- Is it because it is a scattered industry with many small actors spread out geographically? Meaning the support structure actors cannot "go to the factory door, knock and ask the one CEO what the company needs in order to grow"?
- The tourism industry is diverse and embraces many types of companies with different needs. Difficult to speak with one voice and difficult to promote without many tailor made actions?
- Is it because it is a service industry with many women entrepreneurs?

It is probably a combination of all three but the overall conclusion among the participants is that the situation in the Quadruple regions follows a pattern where experience

industries are not favored when it comes to public support. (Malin Lindberg has for example showed that women dominated branches such as the experience industries get a minority of public money for cluster and innovation promotion, whereas branches such as manufacturing and new technologies are prioritized and gets 80 %.)

The participating regions share a dependence of a well functioning tourism industry, but the organizations designated to promote it have little financial resources to work with.

Contact between the four helices

Academia - Entrepreneurs

During the workshop and the following discussion the participants identified that tourism entrepreneurs in the region have quite few contacts with the academic sector. Example on existing input from academia is research and strategies provided by Visit Sweden and Visit Estonia, quite often knowledge that is channeled to the entrepreneurs via tourism organizations working for the whole destination. But in general the connections are rare. The group concluded that interaction between academia and private sector in the Quadruple clusters does not have to be on such a “high” level (as universities for example). A local vocational education centre might be the most suitable. Such vocational education can provide the enterprises with skilled staff, specific industry knowledge and input.

NGO - Entrepreneurs

Tourism SME's quite often belong to associations and NGOs who tries to enhance conditions for their industry, improve the local tourism area or the conditions for entrepreneurship in general. It is often a web of interaction, not just one network. This was especially highlighted by the Swedish MAP members and entrepreneurs. - “here we have associations and networks for everything”, one person said. Sometimes the entrepreneurs make up/constitutes the NGO's, sometimes NGO's come from the outside trying to promote and work for the entrepreneurs.

Government - Entrepreneurs

The everyday contacts between tourism entrepreneurs and the local government, the municipality, often concerns questions about permits, local infrastructure, health & food regulations etcetera. But since the municipalities in the Quadruple area are involved in supporting the tourism through municipal tourism offices and marketing (Roslagen, Väståboland) and as members and supporters of Läänemaa Turism (Lääne county) the entrepreneurs also meets the public sector in the role where it tries to enhance and promote tourism and local business life.

Entrepreneurs situation

Another thing notified and discussed is that a high percentage of the entrepreneurs participating in the Quadruple project (members of the working group E-team) cannot live on their company alone. Many are not full time entrepreneurs and needs a job on the side to survive. It can be explained partly as a side effect of the summer season being

so short and that most tourist SME's depends heavily on the influx of tourist during 2,3 summer months. Nonetheless this is a pattern visible in other service sectors as well, some participants claimed.

Of course there are many within the Quadruple E-team that do live on their enterprises, have several employees and manage all year around. But a notable part cannot. Some business owners see it as a problem; others are content with the situation and do not have a wish to expand.

The study visit participants recognized that it is a complex issue and one cannot identify one solution on how to change the situation. However the group acknowledged the circumstances and the importance of discussing it. The possible problems occurs when women are overrepresented among enterprises with low revenue and perceive it as a constraint. One suggestion was to design and develop support mechanisms earmarked for the service industry and tailor-make measures for this type of micro enterprises (some persons commented that this exists to some extent already, but it can be beneficial to expand).

The Estonian example of local business development centers were highlighted as good examples of how government can support and develop competitiveness and business life in a region. The business centers are financed by the state government, but act locally close to the people living in one area. Through this closeness they can adapt measures, courses, trainings etcetera to the local need and demand.

Cooperation and cluster networking

The cluster thought is much emphasized within the project and was penetrated from many angles during the two study visits. The MAPs found a good example on how entrepreneurs can work together and become a contributor to regional development in Ljusterö Företagarförening who focuses on a wide spectrum of issues, from the importance of a well functioning school to lobbying for a better ferry time table. Especially the participating Hiiumaa actors identified that much could be gained locally if entrepreneurs and actors could work more together and join their forces to reach common goals. During the workshop in Kärdla in June 2011 these ideas was followed up and the discussion furthered. The participants of the June meeting concluded that efforts should be made to create a strong local organization of women entrepreneurs, which is an equal and significant partner to other organizations, on the island. Another main conclusion was that Hiiumaa lacks a strong tourism organisation promoting the whole area. The common marketing of the island and local cluster must be strengthened. The Quadruple project has contributed in uniting the tourism entrepreneurs, but the work must continue and be emphasised also after the project ends. The bottom up perspective is very important since one must build such an organisation on local will and engagement in order to succeed.

One lesson learned in the project is that is crucial to build the cluster cooperation on a common interest in order to succeed. One also has to adapt the cluster initiative to the local needs and prerequisites. One recommendation is to build tourism collaboration on themes. It can be a wide like nature tourism, culture tourism – like in the Lääne tourism strategy – or narrowed down to suit a smaller group of SMEs – like the Roslagen E-team

who based their cooperation on common bicycle packages. No matter if it concerns the brand of a whole destination or a smaller group of entrepreneurs organising health weekends, food trips, horse riding packages or whatever– a major conclusion is that a strong cooperation networks is facilitated when the parties unite under “the same umbrella” and have something concrete to build upon (for a wider discussion see Quadruple Helix reports 2011:3 by Spång and Sterner).

Other good examples of cooperation and networking that were highlighted are the “Community Kitchen initiative” on Saaremaa, “Skön skärgård” in the Åboland archipelago and the Wellness cluster in Uppsala.

To summarize one can conclude that the actors within the Quadruple project have identified obstacles to a well-functioning tourism cluster and a gender equal business support system, but also a wide range of improvements and measures to enhance the situation. As mentioned initially the Multi Actor Partnerships are important carriers of the project results. Since the participants have identified things to be improved and suggested ways to do it, the foundation for action is there and can be continued after the Quadruple project has ended.

A significant contribution from the project is the exploration of the Quadruple Helix working model as a method to promote women’s entrepreneurship. Since the term Quadruple Helix is relatively new, both the research and practical experiences deriving from this project are valuable. The Quadruple Helix method is well described and elaborated in several project publications (see for instance Quadruple Helix reports 2011:2 by Lindberg, Lindgren and Packendorff).





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