**The Economic Impact of Gaelic Arts and Culture within Glasgow**

**A report for Glasgow City Council**

**by**

**Dr Douglas Chalmers, Glasgow Caledonian University**

**Professor Mike Danson, University of the West of Scotland**

**February 2009**

|  |  |  |
| --- | --- | --- |
| **Table of Contents:** | |  |
| Executive Summary | | 3 |
| Introduction | | 6 |
| Background | | 10 |
|  | *Gaelic speakers in Glasgow* | 10 |
|  | *Gaelic Education* | 12 |
|  | *Gaelic in the Economy and Employment* | 13 |
| Methodology | | 15 |
| Constructing a picture of the economic impact | | 16 |
|  | *The Media Sector* | 16 |
|  | *Gaelic at Celtic Connections* | 23 |
|  | *Feis Glasgow* | 24 |
|  | *Ceol ’s Craic* | 26 |
|  | *Leabhar ’s Craic and Film ’s Craic* | 26 |
|  | *Other artistic work carried out by Glasgow City Council* | 26 |
| Summary of the Arts and Cultural Impacts | | 28 |
| Conclusions | | 29 |
| Areas for future research | | 30 |
|  | |  |

**Executive Summary**

* Arts and cultural activities can have significant positive impacts and benefits on a city’s economy and create a richer artistic and cultural environment.
* More than any other city in Scotland, the UK or indeed Europe, Glasgow has had to face the need for restructuring on a massive scale over the last three decades.
* Efforts to promote the arts, culture and hospitality sectors are key to realising the aims of the economic and social strategy for Glasgow as these sectors are recognised as some of the economic strengths of the city (Glasgow Economic Review, 2007).
* The Gaelic dimension to each of these sectors is at the higher end of economic activity and so the language and culture need to be recognised as central to regeneration efforts. This report contributes to a better understanding of this role by measuring the size of the Gaelic arts and cultural sub-section of the Glasgow economy.
* In 2001, nearly three thousand people in Glasgow could ‘Speak, read and write’ (SRW) Gaelic. Although this represented only 0.5% of Glasgow’s population it marked the city as the Scottish local authority with the third highest numbers of those with all round competence in the language, or approaching a tenth of all speakers nationally.
* If a less strict definition of Gaelic abilities – such as the ability to understand, speak, read or write Gaelic is adopted, then the figure is boosted markedly to 10, 034 – approximately 1.7% of the population.
* A high proportion of employment in Scotland which demands an ability to SRW Gaelic is located in Glasgow. About 1 in 6 such jobs are in the city, well in excess of the population share of speakers of the language.
* Of students studying Gaelic or Celtic studies in Higher Education in Scotland, 1 in 5 of those study at a Glasgow University.
* Glasgow has especially high proportions of full-time employees and self employed, with a high degree of stability of employment.
* Well over half of those with ability in the language are in management and technical employment in the city compared with significantly lower proportions in Scotland as a whole for speakers.
* Approximately 113 full time equivalent posts exist in Glasgow in which the ability to speak, read and write Gaelic is essential. These are almost all well paid jobs requiring high levels of skills and professional abilities.
* After extensive secondary research, a survey of all known Gaelic organisations within Glasgow was undertaken to ascertain the extent of their activities, expenditures and employment numbers associated with Gaelic, including the cultural and artistic aspects of their activities.
* This was supplemented with surveys of all those involved in the Gaelic arts and cultural sector including self-employed tutors, teachers, and musicians, as well as organisations who employed staff in the sector.
* Interviews were conducted with a selected group of leading players, organisations and employers in the Gaelic arts and cultural sector.
* It is estimated that overall the Gaelic media sector in Glasgow employs some 120 to 140 people, most of whom had degrees; expenditure is between £2.5 and £3 million
* The aggregate impacts of Gaelic Arts and Cultural Activities (including the media) on the Glasgow economy are in the region of £3.55 to £4 million supporting almost 200 workers in professional and associated employment.
* This sector in the city is therefore nationally significant both with regard to employment for those graduates who can speak, read and write Gaelic and as an active participant in a leading creative industry cluster.
* Some areas within Gaelic arts and culture are under-utilised. There is a need to look in particular at the under-developed marketing and image so that their important social and cultural impacts can be developed to the economic benefit of the city. This is an area worth further targeted investigation, and should lead to economics benefits from untapped potential.
* There is a need for new and improved networks ‘spread the word’ – both to new generations of Gaels and to Glasgow non-Gaels, with dedicated facilities and actions.
* It is also evident that a far greater percentage of Glasgow’s population are accessing Gaelic arts and Culture through for instance Celtic Connections, than have any substantial abilities in the language.
* Policy makers should think of how this can be built upon to arrive at a ‘win-win-win’ situation for the arts, the language, and Glasgow’s economy in the future.

# The Economic Impact of Gaelic Arts and Culture within Glasgow

**Dr Douglas Chalmers, Glasgow Caledonian University**

**Professor Mike Danson, University of the West of Scotland**

## Introduction

Over the last 20 years, increasing acknowledgement has been made of the economic impact of arts and cultural activities, and their role in providing a series of local benefits in addition to creating a richer artistic and cultural environment. A range of studies (Myerscough, 1988, 1995; Hughes, 1989; MacKay Consultants and McGrath, 1991; Sproull and Ashcroft, 1993; Matarasso, 1996; EKOS, 2000; HIE, 2001; Chalmers, 2003; Dunlop et al., 2004) has sought to investigate such impacts in a diverse range of urban and rural settings, from the Western Isles to Glasgow and other conurbations, either independently, or as part of the ‘creative industries’.

This increasing interest has been brought about partly through the shift in most industrialised regions from manufacturing to services. In this context, the ‘labour intensive’ nature of much of the Arts, coupled with high local sourcing, has raised the possibility of cultural industries acting, in part, as a replacement for declining manufacturing employment.

Against this background, the question of cultural tourism and niche marketing of cultural aspects of the local economy have also been considered as important issues in an increasingly competitive globalised economy.

Resulting from this has been a growing interest in the role of Arts and Culture in its ‘traditional sense’. Importantly, however, there has also been increasing interest in the whole question of language, culture and diversity as a *motor for economic change* through its impact on ‘human capital’.[[1]](#footnote-1) Commentators such as Florida (2005) have promoted the importance of creative sectors in generating economic development in cities, while others such as Leadbeater and Oakley (1999) have demonstrated similar causal links between cultural sectors and the attractiveness of cities:

*The cultural industries based on local know-how and skills show how cities can negotiate a new accommodation with the global market, in which cultural producers sell into much larger markets but rely upon a distinctive and defensible local base…. cultural industries and entrepreneurs will play a critical role in reviving large cities that have suffered economic decline and dislocation over the past two decades”*

This links to a growing prominence given to the importance of ‘intangibles’ in economic development by local development agencies.[[2]](#footnote-2) In practical terms, one of the consequences of this approach has been an attempt to explore the relationship between social attributes – such as diversity – and how this may give comparative advantage in aiding innovation and local development through the mobilisation and organisation of resources, (particularly human resources). In this context, diversity can be understood in its widest sense – including aspects of cultural and linguistic difference, such as that offered by Gaelic and other languages. As the Gaelic Arts Strategic Development Forum (GASD) point out, well over 50% of City of Glasgow residents have Scottish or Irish Gaelic in their family background, making this wider community of potential cultural interest a ‘*substantial electorate and…sleeping giant’.*

In their recent report on Audience Development for Gaelic Arts and Culture[[3]](#footnote-3) Glasgow Grows Audiences suggest that ‘*historically, Glasgow and the Gaels are inextricably linked, and if anywhere there is a potential to grow audiences for Gaelic art and culture it is here’*

A further boost to an investigation into this area is given by the requirements of the Gaelic Language Act of 2005, where public bodies including local government are required to develop a Gaelic Language Plan. In the case of Glasgow District Council, GDC was chosen as one of the priority councils due to the developments in Gaelic culture and education taking place in the city.

*Towards an estimation of the impact of Gaelic arts and culture in Glasgow*

Following previously established and generally accepted research (Sproull and Ashcroft, 1993), a useful definition of the Gaelic artistic and cultural ‘industry’ would be to view it as comprising the providers of Gaelic artistic and cultural goods and services and those who consume them. The consumers of such goods and services would comprise not only fluent Gaelic speakers but all with a professional or personal interest in the language and its associated culture (including tourists). The providers would encompass a wide range of services and organisations, such as those mentioned elsewhere in this overall document and would certainly include local Fèisean, Gaelic Book providers, those who stage and take part in musical or cultural evenings, those employed by the media in producing arts and cultural programmes related to or in the medium of Gaelic etc. A useful working definition of the Gaelic artistic and cultural sub-sector in Glasgow might thus be:

*all those activities and jobs, whose principle purpose is the provision of Gaelic related artistic and cultural related goods and services[[4]](#footnote-4)*

The *economic impact* of this sector goes beyond those individually employed in this area, for several reasons. Firstly the income earned by those directly employed will be further spent, either for personal consumption (the multiplier effect), or to purchase further inputs for their activity (the linkage effect). This will create a multiplied effect in both cases, with the local economic impact greater than the original income. In addition, extra spend by audiences can in some instances be substantial.

Also, and importantly, it can be expected that a whole range of further dynamic effects may be created by the provision of such artistic and cultural output. Recent studies (Chalmers, 2003; Chalmers and Danson, 2004a and b) have outlined the perceived positive impact on a range of variables all of which can be shown to have a longer term impact on the local economy, such as tourism; attachment to community and community confidence; decreasing rates of out-migration and increasing rates of in-migration. Although more specifically mapped within rural areas, these can also be expected to exist in every community with a thriving cultural sector. Having acknowledged this, capturing the overall effects of this are more difficult than capturing some of the more ‘concrete’ data associated with jobs and spending, and may also exhibit a longer term effect rather than an immediate impact.

An immediate aim of attempting to measure the size of the Gaelic arts and cultural sub-section of the Glasgow economy, however, would involve a less difficult task and would involve focusing on the providers of Gaelic artistic and cultural services, and essentially the jobs and activities specifically associated with this. This is not necessarily without its complications, though, as it involves estimating the contribution made by such activities to the local economy over and above what would have occurred in the absence of Gaelic artistic and cultural activity. In other words, if one were to calculate the impact of Gaelic musical evenings which, if they disappeared, would simply be replaced by similar (but non-Gaelic) musical evenings, then the Gaelic activity has not in fact been ‘additional’ to what would have taken place in its absence. Nevertheless, despite these caveats, and the acknowledged difficulties associated with measuring the economic impact of cultural activities, a growing body of expertise can be drawn upon in making such an estimate.

*Practicalities of such a study*

Moving from the abstract definition of the artistic and cultural sector given above, several working approaches exist to capturing the boundaries of such sub-sectoral activity. A recent study of the economic impact of the cultural sector in Scotland (Dunlop et al., 2004) employed, amongst other approaches, the Scottish Arts Council sectoral categorisation: *Dance; Music; Visual Arts; Drama; Festivals; Arts Centres; Arts Development* and *Literature,* plus the impact of radio, television and crafts. Related to this approach, earlier studies have evolved a working definition of the Gaelic artistic and cultural sub sector of the economy (Bryden and MacKinnon, 1993), much of which covers a similar area. This paper plans to lay down some first steps in mapping the direct economic impact of all those involved in Gaelic service provision. To achieve this, several stages were undertaken and are reported here. First, the research was put into the context of the recent and rapidly changed social and economic environment of the Glasgow metropolitan area. Next reported is the methodology for the survey of the work of Gaelic organisations based in Glasgow, including the difficulties in achieving the level of information necessary to underpin a comprehensive study of the sector. The results are then explored, before discussion and speculation on possible future developments.

## Background

*Glasgow’s Economy*

Perhaps more than any other city in Scotland, the UK or indeed Europe, Glasgow has had to face the need for restructuring on a massive scale over the last three decades. Once the workshop of the world, it has suffered an almost complete loss of its very core in economic terms: coal, iron and steel, shipbuilding and engineering all but disappeared in a few catastrophic years (Slaven, 2005; Danson, 1991). The legacy of two centuries of industrialisation and the worst housing and social conditions in Europe are still being felt, with 100,000 of its adult population recently dependent on welfare benefits. Yet, in a short space of time the city has regenerated itself and created a new image – a post-industrial city which has become the model for other devastated communities across the continent. New jobs have been attracted in finance, business services, public and personal services, hospitality and cultural sectors so that employment has grown by 80,000 since the mid-1990s (Glasgow Economic Review, 2007). Strategic Plans for the economy, tourism and the Clyde have promised further change, although some have criticised their form, nature and commitment to inclusion (Danson and Whittam 2008).

Central to the ‘re-imagineering’ of Glasgow have been efforts to promote the arts, culture and hospitality sectors as described in the Introduction to this report. The particular economic strengths of the Glasgow are seen to lie in (Glasgow Economic Review, 2007):

* a renewed growth in population
* a dynamic city centre
* a high number of people aged under 50 with degrees
* one of the largest concentrations of students and educational institutions in the UK
* strength in cultural and creative industries, in financial services and in business services
* the most rapidly falling levels of benefit claimants and overall deprivation levels in Scotland.

As will be argued below, the Gaelic dimension to each of these tends to be at the higher end of economic activity and so the language and culture need to be recognised as central to the regeneration efforts. In terms of the sort of Glasgow that the various official partners to the city’s future want to see in 2016, we are promised a city characterised by (Glasgow Economic Review, 2007):

* Must-see attractions;
* World class infrastructure;
* Seamless transport connectivity;
* Events of international significance;
* First class service from a well-trained workforce;
* A clean, well-maintained and sustainable public realm;
* Strong, global brand identity.

### Gaelic speakers in Glasgow

In 2001, nearly three thousand people in Glasgow could *‘speak, read and write’* (SRW) Gaelic, according to the Census of Population. Although this represented only 0.5% of Glasgow’s population it marked the city as the Scottish local authority with the third highest numbers of those with *all round* competence in the language, or approaching a tenth of all speakers nationally.

If a less strict definition of Gaelic abilities – such as the ability to *understand, speak read or write* Gaelic is adopted, then the figure is boosted markedly to 10,034 – approximately 1.7% of the population.

For at least the last two decades, a high proportion of employment in Scotland which demands an ability to SRW Gaelic has been located in Glasgow (Galloway, 1990; Hecla, 2008). Indeed, latest figures suggest about 1 in 6 such jobs are in the city, well in excess of the population share of speakers of the language.

According to the 2001 Census, almost 14 thousand of those economically active in jobs in Scotland claimed they could speak, read and write Gaelic. Of these people in work, some 35% were employed in professional and associate professional occupations and these were concentrated in the urban centres of Glasgow and Edinburgh.

### Gaelic Education

Recent years have seen a substantial rise in the demand for Gaelic education, with Primary one intake, rising from 28 in 2002, through 75 in 2008 to an estimated 100 in 2009.

The development of secondary level education in the Gaelic School in Glasgow has seen a substantial rise in students now able to move from Gaelic medium nursery provision, through primary school and towards the completion of their secondary education through the medium of Gaelic. In the period 2009/10 26 children from primary school are now entering S1, where they will be joined by another 10 children from other local authorities – ranging from as far away as Greenock and Stirling. At present there are approximately 220 families with children at the Gaelic school, resulting in approximately 350 children (including pre-school) undertaking Gaelic medium education. In the session 2009/10 for the first time children will now be entering S5, the level at which Highers are taken under the Scottish education system, after an unbroken experience of Gaelic education from pre-school level and through primary.

As indicated below, the experience of the Glasgow Fèis for pre-5s often acts as a window on the world of Gaelic and can lead to parents deciding to enrol their children into Gaelic medium education. This supports the observations of GASD who argue that *the Gaelic arts enhance Gaelic vitality, status and prestige in the home, the workplace, the schools, the community and media’[[5]](#footnote-5)*

However, of the 653 school pupils in Scotland who claimed that the language of their home was Gaelic in 2001, only 33 lived in Glasgow. This suggests – amongst other issues - that many of those who come to fill higher level posts are either newcomers to the city or do not come from effective ‘monoglot’ backgrounds. So, as much of the dedicated Gaelic education for these professions is undertaken in higher education institutions, it is important to consider the number studying the language or Celtic generally within Universities or their equivalent. In most years, about 250 students are on such courses in Glasgow with between 55 and 75 enrolling each year, or about 1 in 7 of those on Gaelic or Celtic degrees across the country. Of these, over 1 in 5 graduates study in Glasgow (or around 15-20 each year).

As with the other (five) University cities in Scotland, these students demonstrate that Glasgow attracts a net flow of young people - including those with Gaelic. Therefore, it is well-represented in the age bands and occupations with high disposable incomes who tend to consume arts and cultural goods and services disproportionately. Notable also is that over 1 in 10 of Gaelic speakers come from outwith Scotland, offering the potential for further additional spending based on the language.

### Gaelic in the Economy and Employment

Interestingly, in terms of economic activity, Gaelic speakers have a similar profile to the population of the city as a whole, with relatively high levels of residents in full-time employment or education, but also with high levels of unemployment and long-term sickness. However, compared with the four other local authorities with the highest numbers of speakers of the language (A & Bute, Edinburgh, Highland and Eilean nan Siar), Glasgow has especially high proportions of full-time employees and self-employed confirming the stability of jobs for this particular population in the city.

*Table 1. Economic Activity Categories of Population who can Speak, Read and Write Gaelic in Glasgow*

|  |  |  |
| --- | --- | --- |
| Economic Activity | Glasgow City | |
| **Total population (SRW Gaelic)** | **2,455** | |
| Economically active | 1,546 | |
| Employee total | 71.7% |  |
| Employee Part-time | 17.5% |  |
| Employee Full-time | 82.5% |  |
| Total - Self-employed with employees | 3.2% |  |
| Self-employed with employees - Part-time | 8.2% |  |
| Self-employed with employees - Full-time | 91.8% |  |
| Total - Self-employed without employees | 5.8% |  |
| Self-employed no employees - Part-time | 23.6% |  |
| Self-employed no employees - Full-time | 76.4% |  |
| Unemployed | 7.1% |  |
| Full-time students | 12.3% |  |
| Economically inactive | 37.0% |  |
| Retired | 28.4% |  |
| Student | 37.3% |  |
| Looking after home/family | 7.2% |  |
| Permanently sick/disabled | 16.7% |  |
| Other | 10.5% |  |

Source: GROS.

Consideration of the occupational breakdown of the Gaelic community locally shows that, while nationally those with the language tend to be in the higher status positions, this is even more the case in the city and its wider metropolitan area. Well over half of those with ability in the language are in management and technical employment compared with significantly lower proportions in Scotland as a whole for speakers and, in particular, non-speakers. This highlights that those who have capabilities in Gaelic are qualitatively different from the rest of the population, with consequential implications for their consumption patterns, interests and related abilities and skills.

*Table 2. SRW Gaelic Employment by Occupation and Local Authority Area*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Local Authority** | **% SRW Gaelic Population by Occupational Categories** | | | |
| Management & Technical | Administrative & Secretarial | Skilled Trades | Services/ Elementary |
| Scotland | 37% | 13% | 12% | 38% |
| Scotland SRW Gaelic | 46% | 11% | 12% | 32% |
| East Dunbartonshire | 65% | 11% | 7% | 17% |
| Glasgow City | 53% | 11% | 7% | 29% |
| Renfrewshire | 57% | 7% | 8% | 28% |
| South Lanarkshire | 56% | 11% | 8% | 25% |

Source: GROS.

A number of studies (HMIE, 2005; EKOS, 2003; Hecla, 2003, 2006, 2008; Sproull and Chalmers, 1998; Sproull and Chalmers, 2006; Chalmers, 2003; Westbrook, 2006; McLeod, 2001) have extended this statistical work to analyse the location of jobs where Gaelic was considered to be ‘desirable’ or ‘essential’ to the employment across different sectors and locations. In effect, McLeod’s work summarises these:

***‘Gaelic essential’ posts****: a total of 105.4 posts advertised during the period in question were designated as ‘Gaelic essential’. 26.6% of these were in the Western Isles; 34.4% in the Highland Council area (including 11.5% in Skye); 39.0% in other parts of Scotland (including 11.9% in Glasgow); and 0.9% outwith Scotland.*

*Only 4 (at most) of these 105.4 posts were not dependent, directly or indirectly, on public funding. 62.6% were in the Education sector; 19% in Media/Publishing; 9.9% in Arts and Culture; and the remainder in Community/Economic Development, Gaelic Development, Government, Tourism, and Miscellaneous.*

In other words, both the service sectors and public funding are clearly crucial for Gaelic economic activity and, in the case of Glasgow and its conurbation, job profiles and sectors are similar to the overall picture. In an imminent report for Highlands and Islands Enterprise, Skills Development Scotland and Bòrd na Gàidhlig, Hecla Consulting have calculated that approximately 113 full time equivalent posts exist in Glasgow in which the ability to speak, read and write Gaelic is essential. They state that:

*There has clearly been a substantial increase in the number of people employed in posts requiring a competence in Gaelic. Demand is driven primarily by the education sector, the expansion of the media sector and public administration posts. However, beyond these main economic sectors there are also people likely to be employed in Gaelic essential posts in other sectors although these jobs are not necessarily recorded by surveys or other forms of data collection. The main message is that there is emerging demand for Gaelic essential posts across a number of economic sectors providing a wider range of opportunities for people that are looking to enter this particular section of the Scottish labour market.[[6]](#footnote-6)*

These findings are important in two ways: while Chalmers and Danson (2006) have argued that the demand for Gaelic Arts and Cultural goods and services is driven by an interest in the language and associated activities – rather than by competence in speaking, reading and writing in Gaelic, the basis for these sectors and for expansions in demand rests on the foundations of a community of local resident Gaels. **Increasing the number of job opportunities available to those who can SRW Gaelic should generate further economic activities.** Second, the city has a critical role to play in particular areas of Gaelic life, and in education – at all levels, media and related cultural activities especially where the professions and higher level jobs tend to be well represented. Employment in Gaelic sectors therefore tends to be well paid, highly skilled and should be attractive to the city on those terms alone. Also, these jobs offer enhanced access to the career ladders of their respective professions generally so that expansion of the Gaelic Arts and Cultural sectors promises to generate more attractive jobs for Glasgow, retaining more high status posts within this economy.

Together these drivers suggest that the current and potential economic and employment impacts of the Gaelic Arts and Cultural sectors are qualitatively different from many other areas of the city’s economy.

**It follows that deeper analyses of these important sectors is required to ensure that Glasgow is able to realise the full benefits of this resource.**

### Methodology

Following the initial review of the evolving literature in arts and cultural impacts, the census and other data regarding the current situation of Gaelic speakers and learners within the Glasgow market area were reviewed, as discussed above. This was undertaken in consultation with the agency dedicated to pro-active market research in the sector within the city: Glasgow Grows Audiences (GGA), to maximise effectiveness and to minimise duplication. The background environmental and population analyses provided the foundations for the subsequent survey of all known Gaelic organisations within Glasgow to ascertain the extent of their activities, expenditures and employment numbers associated with Gaelic, including the cultural and artistic aspects of their activities.

To inform this survey, a review of secondary research upon the impacts of arts in Glasgow was pursued again in close co-operation with GGA and the Glasgow Gaelic Arts Officer. A survey was generated and conducted, of the self-employed tutors, teachers, and musicians, and also of the organisations who employed staff, at least some of whom were involved in the Gaelic arts and cultural sector. This was undertaken using the data held by the Gaelic Arts Officer at Glasgow City Council based in Culture and Sport Glasgow. These surveys were distributed by post in the spring of 2007.

Stage 3 of the approach was to analyse the data from these questionnaires on the direct economic impact in order to allow a robust estimation of overall economic impact of Gaelic arts and culture within the Glasgow area. It was planned to follow this with an additional mapping of other possible impacts, in terms of the dynamic effects of such output.

## Constructing a Picture of the Economic Impact

As demonstrated above, half of the non-education Gaelic jobs and economic activity nationally, are located in the media and another quarter in arts and culture directly. With a bias towards higher function and professional occupations in Glasgow, it is with these sectors that the analysis starts.

### The Media Sector.

*The Impact of the BBC Gaelic Unit*

Since the creation of the Comataidh Craolaidh Gàidhlig (CCG) in the early 1990s, the Gaelic media sector has played an increasing role in terms of employment and income creation within the Gaelic community. At present the major broadcaster of Gaelic programmes is the BBC , although a number of programmes are transmitted still by STV. Several powerful independent media companies also operate in Scotland (with at least one major company based in Glasgow) providing a whole range of Gaelic productions some of which are then broadcast on the BBC. From Autumn 2008 a Gaelic Digital Service (BBC ALBA) began broadcasting as a joint venture between the BBC in Scotland and MG Alba (formerly the CCG). Clearly the advent of the new Gaelic Digital Channel implies an even greater role for this sector in future. However, the impact of the new BBC ALBA falls outwith the remit of this report as broadcasting commenced after the initial data had been collected and was outwith the terms of reference of this present report.

Reference below to BBC Alba, therefore, refers to the output of the BBC Gaelic Unit, operating before the new channel was created.

The BBC Gaelic unit, (BBC Alba) which is based in the new BBC headquarters in Pacific Quay provided a range of services including its TV broadcasts on BBC2 Alba, (mainly broadcasting Thursday evenings during parts of the year) and through the national radio station Radio nan Gaidheal (mostly produced in Inverness). As an indicator of quality and esteem, in 2007 Radio nan Gàidheal won the award of “Station of the Year” at the 2007 Celtic Media Festival Awards.

The stated aim of the BBC Gaelic unit is to provide broadcast services for the Gaelic speaking audience in Scotland and the UK (with the digitally led ability to receive services furth of Scotland, via the internet, a positive spin-off – albeit seen as a very welcome one). Their aims are aligned with the six public purposes of the BBC (see http://www.bbc.co.uk/bbctrust/framework/purpose\_remits.html).

They are ‘aware they have a crucial role to play in maintaining the Gaelic language’ with the National Plan for Gaelic stating that the BBC is a key provider and facilitator of several outcomes of the plan i.e. *‘a significant increase in the range and quality of Gaelic-medium teaching materials and associated resources’* and *‘an increase in the application of ICT to support learning and extend access to a wider secondary / Gaelic-medium education curriculum’.* BBC Alba has bases in Stornoway, Portree, Inverness, Glasgow, Edinburgh and Oban employing staff as indicated in the Table below. Of the 102 staff, approximately 63 are based in Glasgow, almost all full time.

*Table 4 Location and Categorisation of BBC Staff*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Full Time | Part Time | Freelance | SMO Students\* |
| Glasgow | 55 | 1 | 7 |  |
| Inverness | 17 | 0.5 | 6 | 1 |
| Oban | 1 |  |  |  |
| Portree | 2 |  | 1 |  |
| Edinburgh | 1 |  |  |  |
| Stornoway | 26 | 2 | 3 | 2 |
| Total | 102 | 4 | 17 | 3 |

\* Students on placement from the Sabhal mor Ostaig the Gaelic college on Skye.

Of the Glasgow complement, it is estimated that 56 (55 percent) are educated to degree level with a further 25 having Highers or Diplomas. Seven are in senior management, 22 are producers and 18 clerical. However, it is not possible to give a geographical breakdown of the residences of these categories, though most are believed to live within the Greater Glasgow metropolitan area.

*Training*

In terms of skills development, almost all are receiving training internally. The shift to Pacific Quay – the new Scottish headquarters in Glasgow, and its digital environment, has included craft skill training for everyone – computer based, practical and financial systems. In addition, Gaelic language and scriptwriting are taught to relevant staff. The BBC operates a formal staff development scheme for employees working in the provision of Gaelic related art and cultural products with the aim of the scheme ‘*to create a flexible, multi-skilled workforce*’. Employee turnover in the Gaelic Unit is relatively small – being estimated at perhaps 3-4 staff per year. However, the recent closure by the BBC Trust of the ‘Jam’ education service (following anti-competition complaints from the European Union) led to the need for up to a dozen staff having to be redeployed and absorbed elsewhere within the corporation.

*Expenditure on Gaelic services as a whole*

Approximate spend in 2006/7 – the most up to date period available for complete figures was as follows:

TV and on-line £2.1m (the vast majority of which was spent in the Gretaer Glasgow area)

Radio nan Gaidheal £3.2m (mostly spent in the Inverness area)

In addition, MG Alba contributed approximately £2.7m to the BBC for *Dè a nis* and TV education programmes, and £80k for Radio nan Gàidheal. Until its demise, BBC Jam included within its budget £0.75m for educationally related Gaelic provision, the spend being primarily in the Glasgow area.

For the period covered by these data (up to late 2007), it was confirmed that the then forthcoming Gaelic Digital Service would lead to a substantial increase in funding – up to approximately £18.5m from all sources. The digital service was to be operated jointly with MG Alba. The importance of this investment can be seen by the fact that the most recent previous major increase in investment in BBC Alba had been approximately five years beforehand, then allowing Radio nan Gàidheal to increase transmissions in the afternoons and at weekends.

*On-line and community presence*

In its general approach to Gaelic broadcasting, the BBC argued that the key to their operation was the way it delivered, rather than the content as such. The TV and radio broadcasts mentioned above were supplemented by a comprehensive web presence through the site bbc.co.uk/alba, allowing Gaels worldwide access to their language and culture. They have argued in the past that money unlocks the content, but different platforms allow wider access. Within their portfolio of offerings they suggested that it was difficult in practice, although not impossible conceptually, to separate Arts and Cultural provision from other, general Gaelic provision.

Such synergies and the identification of spillovers, dependencies and co-production runs throughout the analyses of such relations, with Arts and Culture activities in schools being a typical example of the difficulties of separating out education from their influence.

*Gaelic media (BBC) in the wider community*

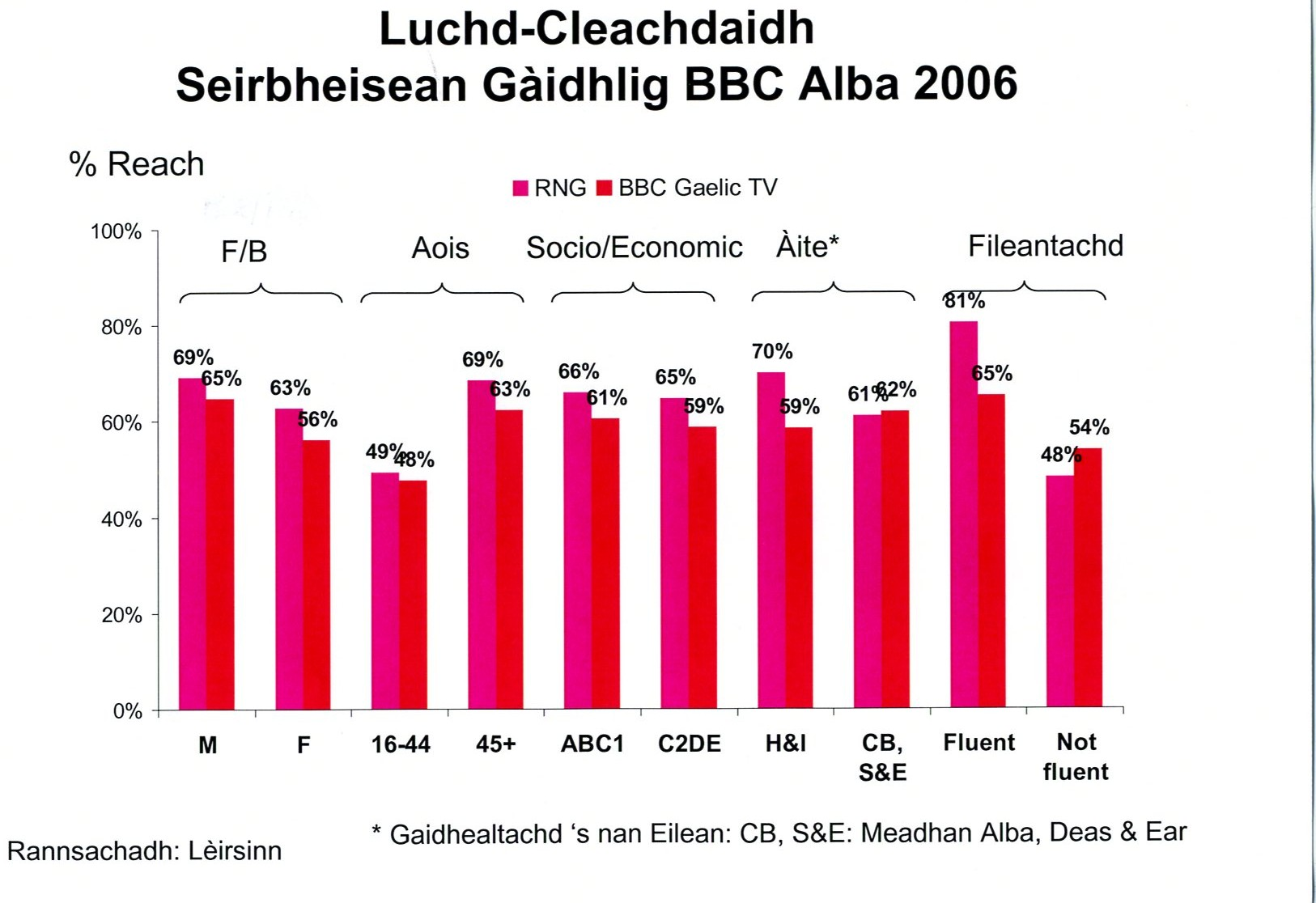
In addition to the above, a series of partnerships with up to 20 organisations has ensured a wider involvement with the community in pursuit of what BBC sees as its ‘public purposes’. These partners have included **Tobar an Dualchais/Kist o’ Riches** – to catalogue, digitise and create on-line access over a period of five years to approximately 12,000 hours of mainly Gaelic language audio recordings. The BBC has also worked with **Ceòlas,** the week-long summer school held annually in South Uist, which teaches a variety of traditional art forms, dance, singing, fiddle, pipes, Clarsach etc. to approximately 100 students. In addition they work with **Prioseact nan Eilan** to record and make available to the **National Poetry Library** all the Scottish Gaelic poems contained in Leabhar Mòr. Most recently the BBC broadcast the groundbreaking **Hiort** – a European opera based around the story of St Kilda organised by Proiseact nan Eilan.

*Changes in population who receive their services, and its impact in the Glasgow area*

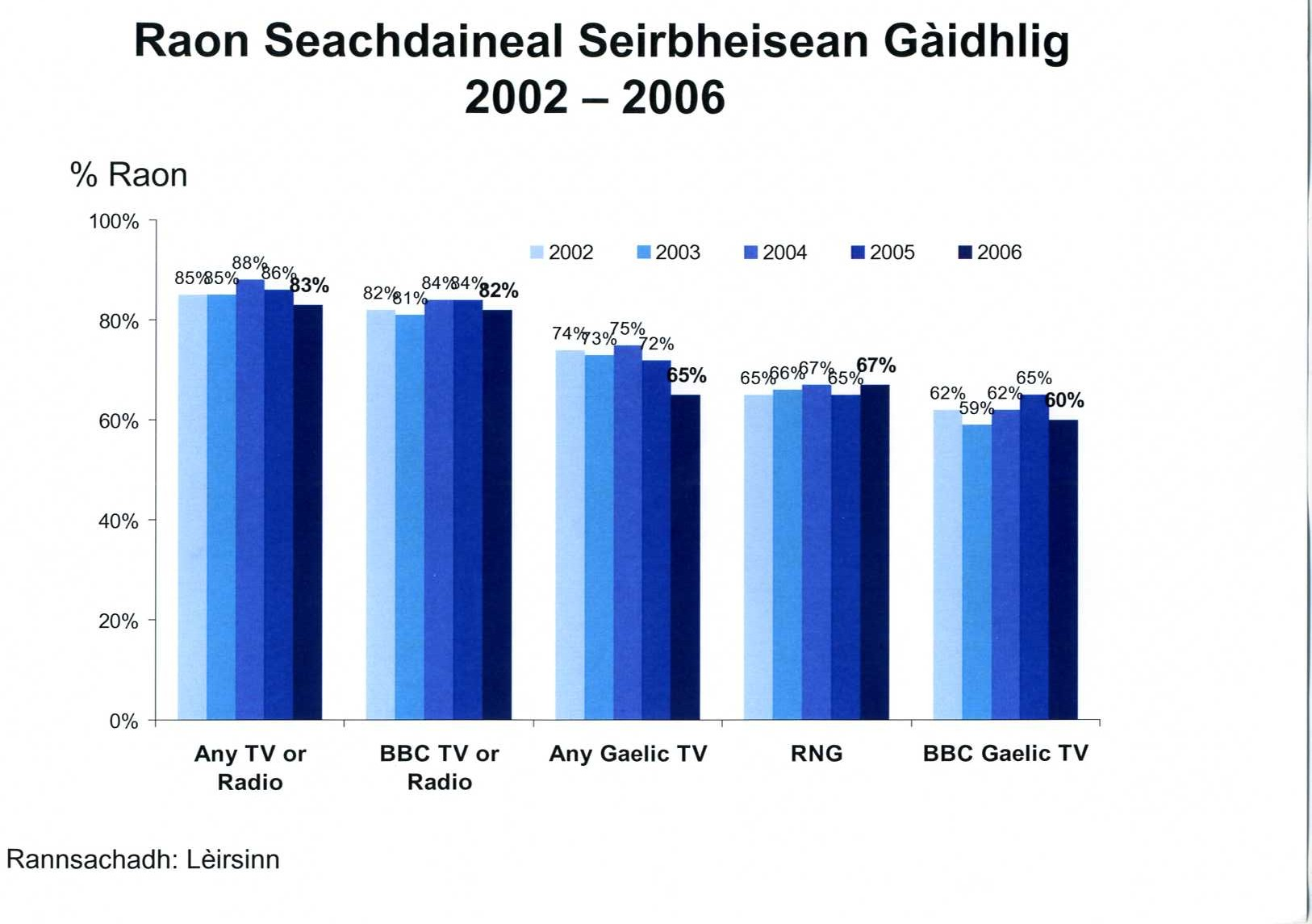
According to the BBC, up to ten years ago, there were more listeners and viewers of Gaelic services in the Highlands and Islands than elsewhere in Scotland (Table 5).

Now they believe that it is rapidly becoming pan-Scottish, with fluent learners regularly taking part in the programmes, as can be seen from Table 5. In the period reported, Gaelic TV was estimated to have a reach of 62% within the Central Belt. These figures arguably reflect both a change in the way Gaelic is seen in the BBC and also in Scottish society as a whole, and link in with factors seen to be crucial for BBC Alba’s growth and development. They also reflect the migration patterns and so changing residence base of Gaelic service users as flexible and mobile labour comes to dominate the economy. The view of the Gaelic Unit staff is that the last 3-5 years have seen the ‘normalisation’ of Gaelic within the BBC’s portfolio of services. In many ways this is considered by staff as a huge cultural change – the norm is now collaboration with BBC Scotland/ News/ Sport, something that apparently could not be previously claimed to be the case. Staff report that they believe they are ‘now on everyone’s radar’, perhaps helped by the way they believe they have pioneered ‘360 degree’ working – seen as the standard approach to production at Pacific Quay.

*Table 5 BBC Gaelic Service Users, 2006*



*Table 6 Levels of Consumption of Gaelic Services, 2002-2006*



*Other factors relating to Gaelic from the BBC*

Other factors also seen as notable are the feeling that they ‘have come out of hiding and made what’s done a lot more visible’.They believe there is a lot more embracing of the Gaelic unit by the BBC overall, with a tangible feeling that ‘they’re now part of BBC Scotland’. Several factors were suggested to lie behind this, including the public recognition of the worth of programmes made concrete through, for instance, *Eorpa* winning awards (BAFTA).

In terms of the future, they argue that the Gaelic Digital Service is in many ways ‘ahead of the pack’ in terms of the challenge of digital technology, given they had the ‘first integrated media service in the UK – TV/ Radio/On-line’.

With regard to broader external factors, BBC Gaelic staff argue that there have been positive impacts from the establishment of Bòrd na Gàidhlig and from the Scottish Government embracing Gaelic as ‘something that belongs to them’. This is added to by the positive impact from Gaelic Medium Education and arts and cultural groups, like An Lochran and PnE, putting energy into the Gaelic arts. An opinion expressed was that Gaelic music in the 1990s may have been bleak – but now it is incorporated into and integral to the work of the RSAMD (Royal Scottish Academy of Music and Drama). Similarly, they argue that Ur-Sgeul the Gaelic book imprint has also been very important in this change of atmosphere and perspectives for Gaelic - as has been the work of Clì – the Gaelic learners’ organisation. All these aspects are considered to feed back into the positive upturn for Gaelic at the BBC. Overall, they believe there have been minimal external negative factors, but they acknowledge ‘it is difficult to know how Gaelic broadcasting would survive without the Public Service Broadcasting remit of the BBC’, and the funds provided to underpin this.

*Summary of Media Impacts*

While the BBC dominates in job, income and expenditure terms, there are not insubstantial impacts from other media activities in the city. Because of confidentiality restrictions, the evidence from the interviews with representatives from these other organisations is more selective and aggregated. However, it does appear that there are strong similarities with the BBC in the staff, turnover and linkage profiles of these ‘independents’. It is estimated, therefore, that overall the Gaelic media sector in Glasgow employs some 120 to 140 people, most of whom had degrees; expenditure is about £2.5 million. This sector in the city is therefore nationally significant both with regard to employment for those graduates who can speak, read and write Gaelic and as an active participant in a leading creative industry cluster.

### Gaelic at Celtic Connections

Glasgow hosts the annual Celtic Connections festival which continues to grow and is now of international importance. Approximately 120,000 tickets were sold at the 2008 event, bringing in an estimated income of £6m to the city. Recent years have seen an increase in the visibility and involvement of Gaelic related artists, with a growing overall financial impact as can be seen by the following figures.

Tickets ranged from £6 for workshops, such as *Come and Try Gaelic Song*, to £24 for *Transatlantic Sessions*, featuring Gaelic artists such as Donald Shaw and Karen Matheson from Capercaillie. Information from Celtic Connections administration allowed us to classify 40 concerts/events which could be either categorised as ‘Gaelic identified’ or where a recognisable Gaelic input could be discerned.

These events or artists included the following:

*Alasdair MacCuish and the Black Rose Ceilidh Band; Alyth McCormack; Benbecula Night; Bodega; Capercaillie; Ceol Mor and the Young Tradition; Clarsach for beginners; Come and try Gaelic Song; Come and try Stepdancing; Come and try Waulking; Come and try Puirt; Daimh; Donnie Munro; Fiona MacKenzie; Fred Morrison with Djarv; Gie me the days when we were young; Griogair; Iain Anderson in conversation with Aonghas MacNeacail; Island Tapes with Comas; Jenna Cumming Trio; Julie Fowlis; Lewis and Harris Night; Maeve MacKinnon; Maggie MacInnes; Margaret Stewart; Mary Ann Kennedy; Ronald Stevenson; Scott Harvey Ceilidh Band; Showcase special with Shooglenifty, Dàimh etc; Skipinnish Showcase; Songs of the Land; Transatlantic Sessions; The Megantic Outlaw; Ùrachadh; Voices of the world*.

Given the eclectic nature of the festival and the mixture of artists appearing on the many platforms, some assumptions had to be made regarding the turnover to be ascribed to Gaelic related acts.

After discussions with Celtic Connections staff, the approach adopted was that where more than one artist appeared on the bill, the calculation of the turnover ascribed to the Gaelic artist was calculated on a percentage basis. Where one Gaelic and one non-Gaelic artist appeared, the overall Gaelic turnover was thus calculated as one half of the total. Although this does not take into account the billing of the artists into main or support, the view of the staff was that in some cases this was difficult to judge, in other cases there were up to eight artists concerned which made such a rational assessment open to interpretation. Overall it was considered that enough concerts took place to allow gains in one area to be balanced by losses in another.

Through adopting this approach, therefore, it was possible to estimate that in total the minimal ticket sales which could be ascribed to a Gaelic input into Celtic Connections amounted to £119,860 – an appreciable impact.

In terms of attendances at concerts/ workshops/ events at which there was a Gaelic presence, some very encouraging figures emerged – with the attendance amounting to 15,359 which is approximately 12.7% - one eight - of the attendances at all events in Celtic Connections. If the estimated share of the income to the city, after multiplier effects, was similar then Gaelic could be considered to have contributed approximately £750k to the Glasgow economy. While, in these terms, this may be considered an over-estimate as a high proportion of the Gaelic audience would have been ordinarily resident in the city, there are less well defined but crucial philosophical questions as to whether there could be a Celtic Connections festival without a critical Gaelic dimension. This is a moot point requiring fuller debate.

This is a very strong indication of the role that Gaelic is playing in a City where only 0.5% of the population speaks, reads and writes Gaelic according to the most recent census figures (above). We would suggest that this is an area where further research can fruitfully take place and where policy makers interested in language regeneration may wish to consider relevant action.

### Feis Glaschu

Over recent years, the Feis movement has grown throughout Scotland, with 42 community led Fèisean attracting 3,800 young people in Scotland in 2006. According to the RSAMD’s 2005 report on the impact of the Feis movement, 76% of Feis participants reported that the Feis had a positive or strong positive influence on their motivation to learn Gaelic. This confirms the finding of the major report by Glasgow Caledonian University (2006) on the demand for Gaelic arts and culture in the Western Isles and Skye and Lochalsh, which found that the development of Gaelic arts activity is considered to be ‘essential’ to the maintenance of the Gaelic language by 80% of respondents. 77% consider access to Gaelic arts activities to be a major motivation for young people to learn or develop their language skills and over 70% believe Gaelic arts and culture to be essential to the economic development of their area. In general the report confirmed that the Gaelic arts are an opinion – changer with 33% of the respondents reporting the arts as motivating positive shifts in attitude towards Gaelic medium education.

The Glasgow Fèis was established in 2003 and normally takes place at Easter. In 2008 there were 97 children taking part - from pre-five, primary school, to teenage. In 2008, tutors were employed to teach accordion, mandolin, clarsach, fiddle, drumming, singing and dancing. Shinty was also an option for those attending.

In terms of providing employment for tutors and assistants/ apprentices, a total of £7,875 was paid for services, travel and accommodation, most tutors being local. Some associated activity was also reported to have taken place in January 2008. In addition to the money paid directly to tutors and apprentices a further £2,185 was paid for local services such as venue, marketing and administration. Like Ceòl ’s Craic the Fèis is dependent on some public funding from Glasgow City Council, Fèisean nan Gaidheal and Comunn na Gàidhlig in addition to the finance raised from ticket sales.

Although these are relativity minor expenditures compared with the media, it can be argued that without such activities there would be several negative consequences. These would include difficulties in stimulating: ongoing interests for adult and child learners; consequential shortages in labour skills and markets; poorer audiences and so wider impacts; a loss of the traditional and contemporary roots for the media, arts and culture generally. All of these would diminish the continuing development if not the continuing presence of the language and related arts and cultural activities.

### Ceol ’s Craic

Ceòl ’s Craic is billed as ‘Glasgow's Gaelic Night Club’ and meets monthly between September and May in the Centre for Contemporary Arts in Sauchiehall Street. It is now in its fifth year, and in the period under study met between November 2007 and May 2008.

The winner of the Traditional Music Club of the year 2007, it has hosted a wide range of Gaelic artists including headliners such as Julie Fowlis and the Vatersay Boys. In the period under study it hosted:

*Maeve ‘Glasgow’ MacKinnon (Glasgow); Brian O’Headra (Inverness); Georaid McLaughlin (Ireland); Geraldine Brethanaic (Ireland); Christine Primrose (Skye); Mary Smith (Lewis) ; Maeve ‘Barra’ MacKinnon (Glasgow); Calum Alex MacMillan (Glasgow); Aonghas MacNeacail (the Borders); Martin MacIntyre (Edinburgh); David Martin (Stornoway); Christina MacKenzie (Aberdeen); Rody Gorman (Skye); Anna Frater (Lewis); Catriona Lexy Campbell (Plockton); Griogair Lawrie (South Uist/Glasgow); Sheena Beaton (Glasgow)*.

As well as music nights, recent activity has broadened out to include film showings and language tuition linked to the monthly events. Collaborative work has taken place with partners across art forms such as Ceòlas, the Gaelic Books Council, Celtic Connections, the National Piping Centre, and Colm Cille. As with the Fèis, Ceòl ’s Craic remains dependent on the public purse although clearly its recent expansion indicates potential to become more self-supporting. In the period under study, turnover was in the region of £13,000 with an estimated £8,500 contributing to the Glasgow economy with the rest attributed to artists based outwith the Glasgow area.

### Leabhar ’s Craic and Film ‘s Craic

The potential for the burgeoning Gaelic publishing sector can also be seen in the beginning of a book festival – Leabhar ’s Craic which took place in May 08 and then February 09. Similarly, with the support of the BBC and the Gaelic Media Sector, a successful Gaelic film festival was launched at the CCA in January 09, showing more than 20 Gaelic films or features over three days, and hosting discussions on Europe seen through Gaelic eyes, and on the way forward for Gaelic Television.

### Other artistic work carried out by Glasgow City Council

In addition to the work of the Gaelic Arts Development officer whose activity underpins the Fèis and Ceòl ’s Craic, Glasgow City Council, working through Culture and Leisure Glasgow, employed a community learning worker at the time of writing with a specialist remit related to Gaelic amongst other duties.

Although the specification of the post was to provide Adult Learning opportunities for new learners, and concentrated principally on Gaelic language learning, it was clear that a section of the work impacted upon cultural and artistic events. One example of this was that, during the ‘Aye Write’ festival, for the first time Gaelic had been integrated as part of the programme. Gaelic writers such as Martin McIntyre had been teamed together with English language writers such as James Robertson.

In a similar vein the book launch of Tormod MacGillean’s book *Slaightearan* had been supported, with the collocation of the community learning officer in the Mitchell Library – serendipitously, the venue for Aye Write.

As with the Fèis and Ceòl ’s Craic the fees paid to the authors were not substantial – being the ‘standard’ Scottish Arts Council amount of £100, so the straight economic impact of this was limited. However, a welcome consequence of the City Council support was that, at little additional cost, it also allowed bilingual material regarding this to go out with the standard publicity and to be featured in media such as the Herald. Some integration with the Glasgow Gaelic School also took place as, during the festival, sessions were organised for Gaelic poet Aonghas MacNeacail to do writing sessions with S3 pupils. Again the indirect and subtle effects of these cultural investments on the long term economic impacts are difficult to identify and measure, but their importance is undeniably substantial.

According to the community learning worker it is clear that some work is being provided for senior pupils at Hillpark secondary, which introduces them into the area of Gaelic arts and culture as a possible income earner. It was reported that during the Fèis Glaschu some part-time temporary opportunities were made available to senior pupils, involving up to 10 students; paid at an hourly rate of £6.66, this amounted to approximately £166 for each student over the week. Again this has a small direct economic impact but may be a substantial incentive for those considering how to use their Gaelic knowledge as they move towards entering the world of work.

Discussions with the community learning worker suggested that there were also perhaps up to 23 sessional workers, funded by Culture and Leisure, working approx two hours per week over a 30 week session. Hourly rates of pay reported were £14.31 for 18 adult workers, and £6.66 (since raised to the higher rate) for five Sradagan tutors (youth leaders). The youth leaders tended to do two and a half hours per week and the adult sessional workers about the same hours.

In terms of the content of their work, most of the youth work tended to be games oriented rather than artistic, although some arts and crafts were an element, however most were delivered through the medium of Gaelic.

In terms of Gaelic tutors working on their own account, either in the field of Gaelic language or as music teachers it was suggested that perhaps twelve to fifteen such tutors would be working at any time in Glasgow, again over a period averaging 30 weeks a year. The going rate was estimated at £18 to £20 per hour, with the number of hours per week ranging from four to about fifteen during the busiest periods depending on the individual.

Although, on its own, this does not provide a reasonable income for the individuals concerned, it does contribute a significant supplement to those engaged. A tutor working for 8 hours per week at £20 for 30 weeks of the year, therefore, could hope to earn £4800 in this manner. This represents a high value income for the hours delivered. This again reinforces the observation that much of this work is seen as additional to other main sources of income, often outwith that concerning Gaelic arts and culture but, determined in the marketplace, towards the higher end of the reward range.

### Summary of the Arts and Cultural Impacts

There appear to be relatively limited linkage effects – backward and forward – for the consumption of Gaelic arts and cultural sectors in Glasgow. Overwhelmingly these are based on service delivery by highly skilled professionals. Most of these transactions are in the private market place, even where there is local or national state support to the ventures. Identifiable expenditure in the city was at least £300k, with almost all of this representing wage income to artists, musicians, tutors, technical and professional staff, etc. About 50 professionally trained Gaelic speakers gain significant supplements to their annual incomes through these activities, almost all securing a premium to the salary they could earn in parallel mainstream work in the city.

It can be argued strongly that the contribution of the Gaelic language and culture to Celtic Connections, and the life of the city more generally, should be more explicitly recognised as essentially greater than is suggested by these data: inevitably incorporating such an approach into the analyses would enhance these impacts appreciably.

Similarly, it has not been possible to separate out the economic impacts of non-centrally organised activities in Glasgow. These include informal folk sessions in bars; ceilidhs and other events in independent venues, student unions and clubs; local Gaelic Associations and Mods. While some of these have no direct economic payments, there are necessarily associated expenditures and so incomes which may be additional to the city’s economy, rather than simple displacement or diversionary activities from within the Glasgow.

## Conclusions

As outlined in the Glasgow Economic Review, it is clear that the arts and cultural sector of the Glasgow economy will play an increasing role in the City’s future, in coming years. Within this, the contribution of the media sector will increase, particularly with the coming online of the Gaelic Digital Service, and the changes being implemented in Scottish society following the passing of the Gaelic Language Bill and the setting up of Bòrd na Gàidhlig. Clearly a substantial impact is already being made by the BBC and others in terms of Gaelic media. The BBC have also stressed the importance of developments within the Gaelic cultural word and its interdependence with the development of the BBC itself.

In relation to Gaelic arts and culture as such, there are positive signs in relation to the prominence and importance of Gaelic at the Celtic Connections festival. The attendance figures, well beyond any figures for Gaelic fluency, suggest this is a fruitful area for language development in future years. The Gaelic dimension to Celtic Connections is critical in determining its identity, attractiveness and impacts.

Other initiatives such as Ceol ’s Craic and Fèis Glaschu are clearly fulfilling an important gap in terms of artistic and cultural provision, as well as (re)creating the labour force and (re)generating consumption demands in existing and new markets. It would appear, however, that this area may still be very under-developed and could be enhanced and expanded through more marketing and promotion.

Artistic and cultural provision through tutoring and initiatives such as Aye Write show a demand that is growing but requires support. Generally, the commodification of traditional Gaelic language and culture is an ongoing and evolving process that raises a number of issues. These include the current need or opportunity for most of those involved in delivering Gaelic services to supplement their income with other additional employment to make a living wage in aggregate. Similarly, there are philosophical and intellectual questions over whether a community’s cultural underpinnings and norms can and should be turned into products and services for a consumer society divorced from their roots. These are issues for the Gaelic community themselves to discuss.

The aggregate impacts of Gaelic Arts and Cultural Activities on the Glasgow economy have be shown to be in the region of £3.55 to £4 million supporting approximately 200 workers in professional and associated employment.

## Areas for future research

Over the past period, it is undoubtedly the case that many in the Gaelic world feel that they have been ‘over-surveyed’ leading perhaps to a reluctance to complete yet another rather detailed questionnaire. In some cases, such as is the case with Gaelic tutors working on their own account, there may be a reluctance to provide detailed information regarding income. In addition some organisations are of course busier than in previous years, given the renaissance of Gaelic activity in the arts and cultural field. Perhaps as a result of this we suffered from gaps in information from some notable organisations including the Gaelic Books Council, Prioseact nan Ealan, Comunn na Gàidhlig, An Lochran and several others which would undoubtedly have helped provide a more detailed picture of the economic impact of Gaelic Arts and Culture in Glasgow. It is clear that these organisations are contributing, sometimes substantially, to the growing Gaelic arts and culture environment in Glasgow and that therefore the figures supplied in this report are inevitably an under estimation of the actual situation. A priority of the Gaelic Arts Strategic Development Forum (GASD) is a programme of continuing research into the nature, needs and aspirations of existing and potential Gaelic arts audiences in rural and urban areas. The content of this present research would suggest that this would indeed be valuable. As the Gaelic Language Plan for Glasgow is finalised and implemented by Glasgow City Council, so there will be a need to repeat this exploratory research to evaluate progress and evolution in the economic impacts of the Gaelic arts and cultural activities in the city. In the year of Homecoming and in the run up to the Commonwealth Games in Glasgow it is hoped that this report can act as a benchmark for such an exercise.

**References:**

Bryden, J. and N. MacKinnon (1993). Gaelic Arts towards a new century, Scottish Arts Council.

Chalmers, D. (2003). The Economic Impact of Gaelic Arts and Culture. Division of Economics and Enterprise. Glasgow, Glasgow Caledonian University.

Chalmers, D. and M. Danson (2004a). Language and Economic Development - Complementary or Antagonistic? Rannsachadh na Gàidhlig 2004, Edinburgh.

Chalmers, D. and M. Danson (2004b). Sustainable Development: Building Social Capital in Gaelic Language Communities. Scottish Economists Conference, Perth.

Danson, M. (1991) The Scottish Economy: The Development of Underdevelopment? *Planning Outlook*, 34: 89-95.

Doeringer, P.B., D.G. Terkla & G.C. Topakian (1987). Invisible Factors in Local Economic Development New York: Oxford University Press

Dunlop, S., S. Galloway, et al. (2004). The Economic Impact of the Cultural Sector in Scotland. Stirling, Scotecon**:** 41.

EKOS Limited (2000). Economic Impacts of Enhanced Funding for Gaelic Broadcasting. Inverness, HIE**:** 10.

Florida, R. (2005). *Cities and the Creative Class*. Routledge.

Galloway, J. (1990). The Role of Employment in Gaelic Language Maintenance. Celtic Studies. Edinburgh, Edinburgh.

GASD (Gaelic Arts Strategic Development Forum) (2007) A National Gaelic Arts Strategy (*draft 2)*

GGA (Glasgow Grows Audiences) (2007) Gaelic Arts and Culture Audience Development. Audience Research

Hecla Consulting Measuring the Gaelic Labour Market, Current and Future Potential. (2008) A report for HIE and Bòrd na Gàidhlig. Inverness

Highlands and Islands Enterprise (2001). Economic Impact of the Creative Content Industries in the Highlands and Islands. Inverness, Sneddon Economics and Market Research.

Hughes, G. (1989). "Measuring the Economic Impact of the Arts." Policy Studies **9**(3): pp33-45.

Leadbeater, C. and Oakley, K. (1999). The Independents: Britain’s new cultural entrepreneurs. Demos.

MacKay Consultants and T. McGrath (1991). The Economic and Social Impact of the Arts in the Highlands and Islands of Scotland, Highlands and Islands Enterprise.

Matarasso, F. (1996). The Social impact of Arts Programmes, Comedia.

McLeod, W (2001) Gaelic in the New Scotland: Politics, Rhetoric and Public Discourse. Sabhal Mòr Ostaig

Myerscough, J. (1988). The Economic Importance of the Arts in Britain, Policy Studies Institute.

Scottish Enterprise (1999). The Network Strategy, Glasgow, Scottish Enterprise Network.

Scottish Office (1997) Towards a development Strategy for Rural Scotland, Edinburgh, Scottish Office.

Slaven, A. (2005). The Development of the West of Scotland 1750-1960, Routledge.

Sproull, A. and B. Ashcroft (1993). The Economics of Gaelic Language Development, Glasgow Caledonian University.

Sproull A and D Chalmers (2006) The Demand for Gaelic Arts: Patterns and Impacts, Glasgow Caledonian University

Westbrook, S et al (2001) Economic and social impact of the arts in the Highlands and Islands, Highlands and Islands Enterprise

1. “People and ideas are increasingly the source of competitive advantage” Scottish Office (1997) [↑](#footnote-ref-1)
2. For instance Scottish Enterprise has based its strategy on the ‘emerging knowledge economy’, where economic value is found more in the intangibles, like new ideas, software, services and relationships, and less in the tangibles like physical products, tonnes of steel or acres of land’ Scottish Enterprise (1999). Doeringer et al. (1987) earlier identified the significance of such ‘invisible factors’ in explaining differences in economic performance between regions. The promotion and role of key actors in the triple (or quadruple) helix of state-industry-academia(-community) in creating the environment for enterprise, innovation and development are crucial as catalysts of knowledge creation, transfer and exchange. [↑](#footnote-ref-2)
3. Gaelic Arts and Culture Audience Development: Audience Research April 2007 p5 [↑](#footnote-ref-3)
4. This is an adaptation of the widely accepted approach offered by Sproull and Ashcroft, ibid. [↑](#footnote-ref-4)
5. A National Gaelic Arts Strategy 2008 – 2012 Draft 2, p 3 [↑](#footnote-ref-5)
6. Measuring the Gaelic Labour Market, Current and Future Potential. (2008) A report for HIE and Bòrd na Gàidhlig. Inverness [↑](#footnote-ref-6)