

Scotland's creative industries

The Royal Society of Edinburgh (RSE) is pleased to respond to the Scottish Funding Council's (SFC's) request for advice on Scotland's current position in research relevant to the creative industries. This response has been prepared under the direction of the General Secretary, Professor Geoffrey Boulton, and has been approved by the Vice-President (Arts, Humanities and Social Sciences), Professor Janet McDonald. In preparing the paper, we have been grateful for comment and information provided by those listed in Annex 1, but the views expressed are those of the RSE.

Definition of Creative Industries

There is considerable debate about the scope and nature of the phrase 'creative industries'. In the UK, the concept of creative industries dates back to 1998, when the Westminster Department of Culture, Media and Sport (DCMS) first published its 'mapping document' on this topic¹. Currently, thinking in the UK government about the creative industries is shifting significantly under the influence of newer ideas about the 'creative economy', that is, in effect, thinking of the economy as a whole as having creativity at its heart.

The first question for research in the creative industries, which potentially includes a wide range of activities related to design, architecture, digital media, fine art, performance and promotional culture as well as media and heritage industries, is definitional, and an agreed definition is important for the organization of academic research units and for the disbursement of focused research funding. There is in practice a continual process of merging and demerging of the 'creative industries' category, i.e. through the manner in which specific interests are pursued (e.g. in higher education, skills councils, advisory bodies).

This paper will be using the list of industries adopted by the EU Council for its *Conclusions on the contribution of the cultural and creative sectors to the achievement of the Lisbon objectives*, May 2007², which drew upon the 2006 European Commission commissioned study on *The Economy of Culture in Europe*³, namely: visual and performing arts, heritage, film and video, television and radio, new and emerging media, music, books and press, design, architecture and advertising.

There are two further points to note; first, it is not clear that the category 'creative industries' is as significant in the industries themselves as it is in research or academic organization within higher education, where 'creative industry' groupings have emerged often for promotional reasons connected with student recruitment or for funding purposes. The category tends to be interest-driven and it would be sensible to

¹ DCMS Creative Industries Mapping Document 1998 and 2001 (http://www.culture.gov.uk/Reference_library/Publications/archive_1998/Creative_Industries_Mapping_Document_1998.htm), (http://www.culture.gov.uk/Reference_library/Publications/archive_2001/ci_mapping_doc_2001.htm)

² Council Conclusions on the contribution of the cultural and creative sectors to the achievement of the Lisbon objectives. (<http://register.consilium.europa.eu/pdf/en/07/st09/st09021.en07.pdf>)

³ The economy of culture in Europe (http://ec.europa.eu/culture/eac/sources_info/studies/economy_en.html)

view it critically. †Secondly, research ‘about’ the creative industries, often conducted by academics and others with an external observational role is different from research ‘for’ the creative disciplines which is conducted largely internally by practitioners.

Importance of the Creative Industries in Scotland

If one accepts the creative industries as a distinct category, it can collectively be considered as one of Scotland’s fastest growing economic domains, contributing five per cent of Scotland’s total GVA and employing approximately 194,000 people⁴. Scotland’s university sector feeds into this by §supplying many of the graduates who work in the sector, contributes to its research and development, and both directly and †indirectly shapes local partnerships and knowledge transfer activities.

DCMS and the Scottish Government have been working on a mapping profile of the creative industries in terms of both Standard Industrial Classification (SIC) codes and SOC2000 Occupation codes. The results indicate the capacity of the Interactive Media and Electronic Publishing sector as the largest UK and Scottish creative industries sector in terms of GVA, employment and exports, and thus of potential growth and future national value. The DCMS has identified that the economic growth of the sector has been twice that of the economy overall in the last decade, with a growth in employment of 3% over the period from 1997 to 2003 compared with 1% for the economy overall. However, a number of other studies have also highlighted the particular difficulties faced in capitalising on the economic potential of the creative industries. These difficulties include:

- The small scale of most operators (which can make it difficult for them to register on the radar of economic development agencies, for example);
- High levels of risk associated with individual endeavours;
- Under capitalisation;
- The intangible nature of Intellectual Property (IP), in which lies much of the potential value⁵;
- Lack (and quality) of official statistical data;
- The sheer diversity of the industries
- The lack of flexibility (in Scotland) to adapt and customise fiscal incentives for inward creative industries investment

Who are the key players in the Scottish creative industries landscape?

The creative industries landscape in Scotland shares many features with others in comparable countries world-wide. The number of key players is significantly larger †than in other sectors, for example, in bio-technology or financial §ervices. This is

⁴ Driving innovation in Scotland. NESTA Policy Briefing 2007 (http://www.nesta.org.uk/assets/pdf/driving_innovation_in_scotland_policy_briefing_NESTA.pdf)

⁵ Copyright and Creativity: cultural economics for the 21st century. Inaugural lecture for the Chair in Economics of Creative Industries. Faculty of History and the Arts. Erasmus University Rotterdam. May 30 2006.

Copyright and the Internet (1997) Law and the Internet: Regulating Cyberspace, eds. Lilian Edwards and Charlotte Waelde, Published by Hart Publishing, (http://www.law.ed.ac.uk/it&law/ch5_main.htm)

because the creative industries include a range of sub-sectors, from advertising and architecture through to fashion and website design and because these sub-sectors are populated by small companies. Although this ecology has its advantages in making the sector flexible and responsive, it does have disadvantages in that this is a group of industries which by definition, depends on the creation of intellectual property but which has limited internal R&D functions.

Key players in determining policy are the Cultural Policy Unit at the Scottish Government (the cultural division) and the Scottish Parliament (specialist committee(s) that deal with creative industry questions from time to time, and the Cross Party Group on Culture and Media). To date, much policy has derived from initiatives taken at Westminster so that it is impossible to ignore the impact of the Department of Culture, Media and Sport in setting agendas, along with other Whitehall ministries, such as the Department for Business, Enterprise and Regulatory Reform.

Other key agencies are the Scottish Arts Council (SAC) and Scottish Screen (both soon to be merged into Creative Scotland), and also, at various times, Scottish Enterprise National (currently only for digital media), Highlands and Islands Enterprise, and the local enterprise companies in Glasgow, Edinburgh and Dundee. The work of training bodies such as Skillset, Skillfast, Creative and Cultural Skills, the Cultural Enterprise Office, are all part of the Scottish scene, but generally relatively small presences.

In broadcasting, there is BBC Scotland (a key spender north of the border), SMG, Channel 4 and the cluster of mainly small independent TV companies, the largest of which is IWC Media, which is owned by London-based RDF. There is also a significant commercial radio presence in Scotland, now largely German-owned. Because communications policy is UK-wide, the communications regulator (Ofcom) is also a key player. There is also the Research Centre (TRC) which provides creative content research and training for broadcasting.

There are major festivals throughout Scotland, the most established of which are the Edinburgh Festivals and Glasgow International festival of Visual Arts and Celtic Connections.

At individual artform level there is also a range of relevant bodies:

- *Performing Arts*

In theatre there is: National Theatre of Scotland, Citizens' Theatre and the Tron Theatre (Glasgow), Royal Lyceum Theatre, Traverse Theatre (Edinburgh), Dundee Repertory Theatre, Perth Repertory Theatre, the Byre (St.Andrews), Eden Court (Inverness) and the Pitlochry Festival Theatre. In dance there is: The Scottish Ballet, Scottish Dance Theatre (Dundee), Dance Base (Edinburgh); Scottish Traditions of Dance Trust and Ballet West.

- *Visual Arts*

In Glasgow, there is The Gallery of Modern Art; Tramway; Centre for Contemporary Art; Burrell Collection; Kelvingrove Art Gallery; Hunterian Museum and Art Gallery; in Edinburgh, the National Galleries of Scotland; the Royal Scottish Academy Inverleith House and the Fruitmarket Gallery; elsewhere

in Scotland there is Dundee Contemporary Arts; Aberdeen Art Gallery, and the MacRobert Arts Centre (Stirling).

There is a wide range of artist-run venues, often supported by the Scottish Art Council including: Stills (gallery) Street Level (gallery); Glasgow Print Studio; Compass Gallery; DCA Print Studio; Peacock Visual Arts; Glasgow Sculpture Studios; G Mac (video workshop); Intermedia (gallery); Generator (Dundee); Transmission (gallery), Market Gallery. Organisations for providing and maintaining studios for artists and designers include: WASPS; Glasgow Independent Studios; GSW3 (Glasgow Studio Warehouse).

The visual arts are also characterised by large numbers of individual artists, practising mainly as one person enterprises, often with very small profit margins but with significant impact on the image of Scotland as a creative and cultural nation.

Commercial galleries may also have significant influence on artists' careers and on public and private collecting strategies, although, by its nature this is difficult to quantify.

- *Heritage*

The Royal Museums of Scotland; the National Galleries of Scotland; the Scottish Museums Council; the National Trust for Scotland, Historic Scotland and University Museums in Scotland (UMIS).

- *Music*

Royal Scottish National Orchestra, BBC Scottish Symphony Orchestra, Scottish Chamber Orchestra and Scottish Opera. In the pop music sector, DF Concerts, Chemikal Underground and Soma Records are important players in Scotland.

- *Books and Press*

The Scottish Library and Information Council, the National Library, Scottish Poetry Library, the Edinburgh International Book Festival, the Storytelling Centre in Edinburgh, the Scottish Book Trust, the Gaelic Books Council, and Publishing Scotland

- *Design & Architecture*

The Architecture department of the Scottish Government; Architecture and Design Scotland; The Lighthouse Centre for Architecture, Design and the City; The Royal Scottish Academy, The Royal Incorporation of Architects Scotland and the schools of architecture in Scotland.

Key players in the field of design are major design and advertising agencies such as Tayburn. The sector is also characterised by small enterprises such as Timorous Beasties, Graven Images, Navyblue, Lightweight Medical, 4C, Brazen Studios, and Squeegee. In 3D visualisation, the key players include the Digital Design Studio at the Glasgow School of Art, School of Media Art & Imaging at Duncan Jordanstone College of Art and Design (DJCAD), and Halcrow and Arup in the commercial sector.

- *Advertising*

In advertising, both the Leith Agency and Newhaven have won national UK and international business in competition with London agencies.

Professional training schools in the creative and performing arts (for example, the Glasgow School of Art, DJCAD at Dundee University, Edinburgh College of Art, Gray's School of Art at Robert Gordon University, The Royal Scottish Academy of Music and Drama, and Queen Margaret University Drama Department) are major players in attracting creative people as students, teachers and researchers who generate and exchange the latest knowledge in their disciplines, and influence the shape and policies of the creative industries.

Current and developing policy in Scotland relevant to the creative industries

Policy at a Scottish level has been driven and shaped by thinking about the creative economy developed in London over the last decade. This has been adopted - largely unchanged - by both Scottish Enterprise and the Scottish Government, although Scotland has been at the forefront of culturally led regeneration.

Creativity has been, and will continue to be, a key driver for knowledge economies, particularly but not only in the creative industries. Creativity has become the driving force of economic growth. The ability to compete and prosper in the global economy turns on the ability of nations to attract, retain and develop creative people.⁶

Much of the product of the creative industries has easy worldwide portability and the potential for exploitation internationally. Some argue that the UK benefits from creative industries proportionately more than other developed countries, and the UK government highlights this arena accordingly. Following its 2001 task force on the creative industries, the UK Department for Culture, Media and Sport has published *Staying Ahead, the economic performance of the UK's creative industries*. Acknowledging the importance of the UK's creativity in terms of images, ideas, design, the report cites the "increasingly important role" that the creative and cultural industries play in economic life. In the UK, these industries account for 7.3% of the economy and employ one million people, with another 800,000 individuals working in creative occupations. The report states: "Today there is growing recognition of the subtle but important linkages between the vitality of the creative core, the creative industries beyond and creativity in the wider economy."⁷ The earlier Cox Review on *Creativity in Business* also stressed "the importance of creativity, design and innovation to business performance and the UK economy".⁸ Overall, the creative industries are high on the public policy agenda both in the UK⁹ and abroad.

The economic arguments for the sector are often conjoined with cultural perspectives relating to matters such as national identity. In Scotland, cultural policy has also had an emphasis on access. The research evidence that engaging in cultural activities increases self-esteem (v. clause 2.10 in 2007 Draft Culture Bill) has been the driver for a good deal of widening participation/client-facing cultural policy. 'Bringing

⁶ Florida, Richard and Tinagli, Irene (2004) "Europe in the Creative Age", Demos, p.5

⁷ Hutton, Will et al. (2007) *Staying Ahead: the economic performance of the UK's creative industries*. www.theworkfoundation.com

⁸ Cox, George et al. (2005) *Review of Creativity in Business: Building on the UK's Strengths*. www.hm-treasury.gov.uk/independent_reviews/cox_review

⁹ *Creative Britain: New Talents for the New Economy* (2008) DCMS, http://www.culture.gov.uk/Reference_library/Publications/archive_2008/cepPub-new-talents.htm

culture into the lives of more people' is a praiseworthy goal, but it is questionable whether it should be the primary goal for a cultural policy which can only be confident of its world-class status, on which the importance of wider access rests, if it retains a high artistic reputation for its product and builds research capacity.

In terms of the Scottish policy framework, the previous Government established the Cultural Commission to undertake a Cultural Review, which reported in 2005¹⁰, and in response to its findings, published *Scotland's Culture*¹¹ which envisaged that the new body, Creative Scotland, would have a remit for developing strategy and support to the creative industries in Scotland and that it would consider a transfer of functions and funding from Scottish Enterprise to the new body. The present Government is currently considering how to deliver its Manifesto commitment to follow this through and to determine how the role should be delivered when the new body is created in 2009. At present, the Scottish Arts Council has a wide range of policies concerning Scotland's cultural sector and Scottish Screen is the main development agency for the screen industry in Scotland.

In the heritage sector, action points have been identified in the Scottish Museum Council's National Audit (2002), the Scottish Government's Recognition Scheme and the Scottish Museums Council's Accreditation Programme. In general these proposals and documents are aimed at raising standards and improving governance. With regard to architectural policy, the Scottish Government has an Architecture Policy, published in 2006¹² which sets out forty commitments, including the objectives: to promote the value and benefits of good architecture, to foster excellence in design and to ensure that the planning and building standards systems and their associated processes both promote and facilitate design quality in development.

The Scottish Government in its new economic strategy identifies Creative Industries as one of six priority sectors for the growth of the economy but, as yet, has not published a policy to underpin that sector. This may be because the sector itself is not yet a coherent entity, in terms of ownership of the initiatives, management structures: national and local interests and academic, commercial and charitable independents with each sector having different priorities. In the meantime, Scottish Enterprise National has focussed its attention on Digital Media.

The extent and nature of Scotland's research capability (human and physical) in this area:

i) Higher Education Institutions

Universities with key involvement in the creative industry sector, providing students at undergraduate and postgraduate level with practical skills and training include:

Edinburgh College of Art

¹⁰ Our Next Major Enterprise. Final Report of the Cultural Commission, June 2005. <http://www.scotland.gov.uk/culturalcommission/cultural/files/Final%20Final%20Report%20June%2005.pdf>

¹¹ Scotland's Culture. Scottish Executive, January 2006 (www.scotland.gov.uk/Resource/Doc/89659/0021549.pdf)

¹² A Policy on Architecture for Scotland. Scottish Government. 2006. (<http://www.scotland.gov.uk/Publications/2001/10/10129/File-1>)

Glasgow Caledonian University, Caledonian Business School (Cultural Businesses)

Glasgow School of Art

Heriot-Watt University, School of Textiles and Design
School of the Built Environment (architecture)

Napier University, School of Creative Industries

Open University, Department of Music

Queen Margaret University, School of Drama and Creative Industries

The Royal Scottish Academy of Music and Drama (RSAMD)

The Robert Gordon University, Grays School of Art
The Scott Sutherland School of Architecture & Built Environment

UHI Millennium Institute, Cultural and creative industries subject network

University of Aberdeen, Department of Film Studies
Department of English (creative writing)
Department of Music

University of Abertay, School of Computing and Creative Technologies

University of Dundee, Duncan of Jordanstone College of Art & Design
School of Media Arts & Imaging
School of Architecture

University of Edinburgh, Department of Architecture
School of literatures, languages & cultures (Film studies)
Department of Music

University of Glasgow, Department of Music
Department of Theatre, Film and Television Studies
Department of English Literature (The Edwin Morgan Centre for Creative Writing)
Department of the History of Art (Decorative Arts & Design History)

University of St.Andrews, Department of Film Studies
School of English (Creative writing)
School of Art History (Museum and Gallery Studies)

University of Stirling, Department of Film, Media & Journalism
Centre for Publishing Studies

University of Strathclyde, Department of Creative & Aesthetic Studies
Department of English Studies
Department of Architecture

University of the West of Scotland, School of Media, Language and Music

The current research strengths in Scotland in the higher education sector are summarised below alphabetically:

Performing Arts

- Department of Theatre, Film and Television Studies, University of Glasgow
- National Centre for Research in the Performing Arts, RSAMD

Visual Arts

- Grays School of Art , The Robert Gordon University
- International Drawing Research Institute, in partnership with the central Academy of Fine Art (Beijing) and the College of Fine Art (University of New

South Wales); Studio 55; Centre for Research in Fine Art Practice; The Glasgow School of Art

- Nozomi, Edinburgh College of Art
- RBS Centre for Community Arts Research and Practice, Queen Margaret University
- Visual Arts Research Institute (VARIE) Edinburgh, established in 1999 as a consortium consisting of: The University of Edinburgh, The National Galleries of Scotland, The National Museums Scotland, Edinburgh College of Art, The University of St. Andrews, and The University of Glasgow.
- Visual Research Centre, Duncan of Jordanstone College of Art & Design, University of Dundee

Heritage

- Centre for Materials Science and Engineering, University of Edinburgh
- Mackintosh Research Centre for Archives and Collections, the Glasgow School of Art
- Scottish Centre for conservation studies, Edinburgh College of Art
- School of Art History, University of St. Andrews
- Visual Research Centre, DJCAD
- Windows on the West, Gaelic Visual Culture Group, DJCAD and University of the Highlands & Islands

Film, video, television and radio

- Caledonian Business School, Glasgow Caledonian University
- Department of Film, Media & Journalism, University of Stirling
- Department of Theatre, Film and Television Studies University of Glasgow
- School of Media, Language and Music, University of the West of Scotland
- Scottish Documentary institute, Edinburgh College of Art
- Screen Academy Scotland, Napier University and Edinburgh College of Art

New and emerging media

- Digital Design Studio, The Glasgow School of Art
- School of Media Arts & Imaging; and Centre for Forensic and Medical Art, DJCAD and School of Life Sciences, University of Dundee
- Virtual environments and the arts, Edinburgh College of Art
- White Space Solutions, School of Computing and Creative Technologies, University of Abertay

Music

- Department of Music, University of Aberdeen
- Department of Music, University of Edinburgh
- Department of Music, University of Glasgow
- Ian Tomlin School of Music, Napier University
- National Centre for Research in the Performing Arts, The Royal Scottish Academy of Music and Drama

Books and press

- AHRC Centre for Irish and Scottish Studies (on modern poetry), the Centre for the Novel, and the Walter Scott Research Centre, University of Aberdeen
- Centre for Artists' Books, Visual Research Centre, DJCAD
- Centre for Publishing Studies, Department of English, University of Stirling
- Department of English Literature, University of Edinburgh

- Departments of English and Scottish Literature, University of Glasgow
- Department of English Studies, University of Strathclyde
- School of English, University of St. Andrews
- The Edwin Morgan Centre for Creative Writing, and the Robert Burns Centre,

Scotland has been a leader in encouraging connections between academic literary studies and creative writing, since many of the leading contemporary poets also have university posts.

Design and architecture

- ABACUS, UDSU, PATH, Department of Architecture, University of Strathclyde
- Department of Architecture, University of Edinburgh
- Geddes Institute, School of Architecture; EPSRC/AHRC Designing for the 21st Century, DESIGN Against TERROR, School of Design; Natural Design Group, Visual Research Centre; 3D Visualisation Research Group, DJCAD, University of Dundee
- Grays School of Art, The Robert Gordon University
- Openspace; scotMARK, Edinburgh College of Art
- School of Creative Industries, Napier University
- Supporting Architecture & Design in the Built Environment (ADiBE), Heriot Watt University
- The Glasgow School of Arts: Centre for Advanced Textiles; Centre for Innovation, Design and Creativity in partnership with the University of Glasgow; the Glasgow Urban Lab in partnership with Glasgow City Council, Architecture and Design Scotland and the Lighthouse; Mackintosh Environmental Architecture Research Unit

The nature of architectural research remains largely unresolved. There seems to be a divide between materials and methods of construction, versus the creative aspect of design. Relations with industry tend to be almost entirely technical - i.e. 'how to': very rarely 'what to'.

Creative/cultural policy

- AHRC Research Centre for Studies in Intellectual Property and Technology Law, University of Edinburgh
- Centre for Creative Education, The Glasgow School of Art
- Centre for Cultural Policy Research (CCPR), University of Glasgow
- Grays School of Art, The Robert Gordon University
- Home: Canadian First Nation homeland research group, VRC, DJCAD and NWTerritories Canada; Centre for Remote Environments, VRC, DJCAD
- Institute for Capitalising on Creativity, University of St. Andrews, DJCAD, University of Abertay and the RSAMD

For many areas within the Creative Industries sector it would be true to say that Scotland suffers from both a lack of scale and scope. There is a scattering of relatively small centres and some university departments with individuals doing work of major relevance to questions of policy and knowledge transfer. However, Glasgow School of Art, which scored a 4 in the 2001 Research Assessment Exercise (RAE), is the second largest art and design research community in the UK, second only to the much larger University of the Arts network of art colleges in London. In addition, the four

Art Colleges in Scotland have more research active staff than the University of Arts seven London colleges.

Academics in these areas tend either to reflect the 'text' based heritage of arts- based disciplines, with a focus on either the cultural significance, or on the historical and theoretical background of these artforms, or to focus on the craft and practice of the disciplines including, for example, musical or theatrical performance as a form of research (encouraged by the broader definitions of research in these areas in the current Research Assessment Exercise).

ii) industry

In addition to the key players noted above (p.4), commercial research strengths can be found in:

Art Festivals

There are some organisers of art festivals with substantial budgets in the creative industries. These include the Edinburgh Festivals, Perth Festival, Orkney Festival, the Gaelic Feis festivals across Scotland, Glasgow International festival, UZ events, Celtic Connections, new moves (live art), and arika (contemporary music).

Visual and performing arts

The fine art organisation, Common Guild, is also starting to develop a research-based approach, and the Dalziel & Scullion Environmental Research Studio, based in the School of Fine Art, DJCAD, has been established by the Funding Council's Knowledge Transfer Fund, as a public art consultancy unit and a model for spinout of practice into commercial activity.

There are very few commercial galleries dealing in contemporary art of scale in Scotland. Examples include: Sorcha Dallas; Modern Institute, Mary Mary (in Glasgow); Doggerfisher; Ingleby (in Edinburgh) and ScotlandArt (Edinburgh and Glasgow).†

Film, video, television and radio

In the broadcasting sector, TRC in Glasgow exists to undertake research for and about broadcasting in Scotland.

Books and press:

Scotland has always had a distinguished tradition in publishing, but this has been somewhat eroded in recent decades. There are a small number of relatively small presses in Scotland that punch well above their weight when it comes to the publishing of creative work in Scotland, including Canongate, Birlinn/Polygon and Luath.

Design & Architecture

There are a number of significant architects firms in Scotland including RMJM, Sutherland and Hussey, Malcolm Fraser, Richard Murphy, Page\Park and Reiach and Hall.

Cultural policy:

There has been a longstanding role for consultants in Scotland, undertaking work for private companies and public bodies. Examples might include EKOS, Scottish Cultural Enterprise and Hexagon.

iii) Other bodies or organisations

The Scottish Arts Council and Scottish Screen have small research departments and commission work in partnership with a variety of organizations. The Cultural Policy Unit at the Scottish Government engages in research, as does the Scottish Broadcasting Commission, and the Europe, External Affairs & Culture Directorate of the Scottish Government contains researchers, statisticians and economists, and commissions research. The focus of research by such bodies, however, is focused on operational and data collection rather than blue-sky or practice based research. Their funding, however, does support organisations such as New Media Scotland, which instigates and supports experimentation in art and technology.

In-house research capacity within the public sector that is initiated by local authorities and enterprise agencies is limited and underdeveloped in Scotland compared with England, where most Regional Development Agencies and Regional Cultural Consortia now have some kind of research function dealing with the creative industries at a strategic level, often with links to regional academic institutions. While this may be limited and often is confined to the work of one dedicated person - it is more than presently exists in Scotland. There is nothing in Scotland that compares, for example, with the research capacity of the London Development Agency e.g., London Economics, which does a great deal of high quality work on the capital's creative industries sector. As a result most of the policy research expertise in the creative industries in Scotland is based in private consultancies.

In terms of the visual arts, the Royal Scottish Academy initiates collaborative projects involving artists and architects at all stages in their careers, and provides input into the Governing Bodies, Boards of Management and Committees of the National Galleries, the Scottish Arts Council, the National Trust, the Royal Incorporation of Architects, Scotland and the Royal Fine Art Commission. There are other societies in Scotland, such as the Royal Glasgow Institute of the Fine Arts (RGI), The Royal Scottish Society of Painters in Watercolours (RSW), and the Society of Scottish Artists (SSA), which all provide opportunities for artists, members and non-members to show their work. These societies show annually in various galleries such as the Royal Scottish Academy in Edinburgh.

Museums, heritage buildings/sites and art galleries (other than non-collection based, contemporary exhibiting galleries such as Fruitmarket and CCA) usually operate primarily from their historical building and collection base and have often been overlooked as participants in the creative industries which tend to be defined as 'modern' or 'contemporary' and practitioner focused. However, they are heavily engaged in the creative industries as:

- Sites of inspiration and performance/ installation for practitioners.
- Commissioners of artists, photographers, craftspeople, film makers and digital artists, etc.

- Major sites for cross domain projects which are publicly and often freely accessible all day, year round, unlike many performance venues.
- Exhibition and performance sites addressing a wide public.
- Innovators in educational and interpretive practice.
- Providers of creative educational opportunities outside the standard curriculum with a capacity to engage disengaged young people.
- Originators or would-be originators of remote access and on-line engagement and a commitment to extend access to and understanding of their sites, collections and stories.
- Initiators in or leaders of players in creative and collaborative projects to conserve, re-purpose, and regenerate buildings, sites and communities.

How does the Scottish i) policy and ii) research capability in this area compare to that in the UK and in other nations/regions internationally?

i) Policy

Internationally, in North America, the Far East or Australasia, the creative industries are recognised as important in terms of developing the twenty-first-century knowledge economy. After a flurry of activities in the late 1990s, Scottish Enterprise has turned its attention away from the area and there is some evidence that Scottish public policy falls behind the rest of the UK and the world in this regard.

In England, unlike Scotland, there has been some notable academic research into public policy formation. Instances are City University's role in developing the original DCMS creative industries mapping document, LSE's work for Scottish Enterprise and the DCMS, Manchester Metropolitan's work for the public agencies in Manchester, and regional mapping work carried for Yorkshire and the West Midlands respectively by Leeds and Birmingham Universities. The movement into academia by key journalistic figures at Oxford and Cardiff has ensured a steady flow of commissioned work by bodies such as Ofcom and the BBC Trust. There is nothing comparable in Scotland and our distance from the centre of UK power unquestionably impacts on our overall visibility and routine inclusion, irrespective of the quality of the work of the best individuals and teams.

At present, serious policy and critical research into the nature, status and ongoing development of the creative industries in Scotland is limited, lacks robust data and is not adequately funded. As a result, the policy agenda and dominant thinking in this area is still largely set in London. The main players UK-wide are government, regulatory agencies such as Ofcom and favoured policy think tanks such as the Work Foundation, NESTA, Demos and IPPR.

There is, nevertheless, a critical mass question in the creative industries in Scotland. For example, Scottish broadcasting (like the Scottish press which is losing steadily to London titles) does not have the resources to compete with other centres in critical areas of production. It seems clear that market forces affect different creative industries in different ways, again depending on definition. It has been possible, for example, for Scottish design companies to flourish, and likewise promotional companies of various kinds, which can build on a local client base and then export established skills and reputations. An industry like broadcasting, in which investment requirements can be large and risky, itself raises a variety of cases and is often

difficult to interpret. Ireland, an independent state and capable of as complete an autonomy as is feasible in the globalized world, is nonetheless, like Scotland, unable to compete against the influx of high value London-based media content. Yet where specific national strengths have emerged in small countries, such as Finland's achievements in the mobile telephone field, political autonomy enabling the operation of national strategy has been essential as an element of success.

ii) *Research capability*

Outside London, the picture is similar across the UK. In Wales, Cardiff University has the largest group of researchers in the media field, and there are other small centres. In Northern Ireland, the University of Ulster is the most significant player for film and media, with Queen's Belfast doing work on music. One importance difference for Scotland is the absence of capability funding, and significantly lower levels of Postgraduate Taught and Research funding in Scotland, leading to impoverished academic replenishment.

In England, there are more and larger university research centres. Particular expertise exists at City University, Goldsmiths, Leeds, LSE, Liverpool, Salford, Westminster, Warwick, and the University of the Arts. But research is very sector specific, and except in the few specialist groupings with a public policy orientation, is not for the most part directly relevant for policy formation or knowledge transfer. Research in, and through, the fine arts is at an emerging stage throughout Europe.

In the heritage sector, there is currently only a limited provision in Scotland for research opportunities of direct relevance and benefit to the museum and gallery sector. This can in part be linked to the absence of related higher education/vocational courses. For example there is no provision in Scotland for museum/gallery conservation training, as exists at Northumbria University. Nor, beyond one diploma course at the University of St Andrews, is there focussed Museum training, although there are courses that deal with topics such as Heritage and Tourism¹³. Such courses exist in England, for example at the Universities of Manchester, Leicester, and East Anglia. An important development, however, is the potential opening of a branch of the Victoria and Albert Museum in Dundee, with links to the heritage research activities of the DJCAD.

In architecture, the funding available from the Commission for Architecture and the Built Environment in England is significant, while that available to Architecture and Design Scotland is poor. This is an issue of scale, in response to which Scotland needs to network internationally. In terms of other European countries, Scotland is towards the very bottom of the scale (Finland is top). In terms of design, HEFCE has been very active in supporting the follow up to the Cox Review in England, resulting in a £3.8 million investment in Design London, and international benchmarking in Design with the Design Council. In the U.S. the 'd.School' at Stanford has been set up to support multidisciplinary innovation. There is no similar support for strategic initiatives in this area in Scotland.

¹³ Museums & Galleries Yearbook, 2007, published by the Museums Association provides a listing of UK courses and training. Only two Scottish institutions are cited: University of Glasgow, for MLitts in Decorative Arts, History of Collecting and Collections; 19th Century Art Architecture and Design; and Policies: Transgression: Twentieth Century Avant-Gardes; University of St Andrews, for Diploma (1 year) Museum and Gallery Studies; and MPhil (2 years) National Trust for Scotland Studies.

From an international perspective, it is noticeable that if one goes to the UNESCO site concerned with creative industry research¹⁴, lists a wide range of national and international centres under the headings, 'International and Regional Observatories/Research centres', 'National Observatories/Research centres', 'Regional and International Organizations and Networks' (a number of which are essentially private or even commercial) and 'Foundations', but not one for Scotland.¹⁵

In the creative industries themselves, investment in research and development in Scotland is believed¹⁵ to be lower than key areas in the UK including London and the South East, the North West and Bristol as a result of public sector investment through regional development agencies.

What efforts exist at Scottish, UK and European level to support developments in research across the creative industries?

Efforts to support developments in research across creative industries are almost exclusively UK based, rather than Scottish or European. The four most significant are the AHRC, the British Academy, the Leverhulme Trust and the Economic and Social Research Council, but there is also funding available through other bodies such as Engineering and Physical Sciences Research Council. The creation of the AHRC has increased the capability of the higher education sector to do much larger scale funded research over a longer period of time with much more clearly defined aims.

7% of collaborative doctoral awards from the Arts & Humanities Research Council (AHRC) in 2007 came to Scotland, despite the presence of national collections and a university sector with over 10% of the UK's research capacity. Of these four awards, two came to the Department of Theatre, Film & Television Studies at Glasgow University. Only one engaged with a national collection. In 2006, three were awarded in Scotland, one to the University of Aberdeen (Music), one to GSA (Digital Art) and one to RSAMD (Playwriting) In 2007, there were 17 AHRC Fellowships in the Creative and Performing Arts: one was awarded to Theatre Studies at Glasgow University, and one to the Department of Music at the University of Edinburgh. In 2007 three major grant awards were made to Scottish HEIs, one to the University of Edinburgh (Music), and two to the University of Glasgow, (History of Art and Theatre Studies). In 2006-7 one out of 22 research networks involving museums and galleries funded by the AHRC came to Scotland. Scotland's four art schools have fared well, with AHRC Research Grants in the Creative Arts: Edinburgh College of Art (eca), Duncan of Jordanstone College of Art & Design (DJCAD) and Glasgow School of Art (GSA) have, between them secured eight major awards with a value over £300k and over a dozen Small Awards in Creative and Performing Arts (£20k) over the past five years

Within Scotland, the RSE's Research Awards in Arts & Humanities fund collaborations between HEIs and Scottish cultural institutions, through:

- Research Workshops - to initiate collaborations, possibly by organising colloquia, conferences or inviting distinguished visiting scholars/practitioners to Scotland.

¹⁴ http://www.unesco.org/culture/development/observatories/html_eng/members.shtml

¹⁵ Source: Professor Seona Reid, Glasgow School of Art

- Research Networks - to create and consolidate partnerships, to support administration, to cover travel to archives, libraries, performances, exhibitions, and conferences

Where are the current world leaders in this area? Can Scotland realistically take a lead in any aspect or aspects of this area?

In spite of the wide interest in the creative industries as an area for creative and cultural and business development, there is no acknowledged international leader, although the DCMS has an ambition for the UK to be ‘the world’s creative hub’. The diffusion of effort and focus described as existing in Scotland is otherwise reflected worldwide, partly because thinking about the creative industries and their interaction is still developing. There is no doubt that there is rising interest in the creative economy in the Nordic countries, Latin America, Spain, China, South Korea and Singapore. The ideas presently in circulation will doubtless be ‘indigenised’ according to local circumstance. Interest in this field is on a rising curve and represents an opportunity for Scotland to intervene.

Cultural policy

In Europe there are significant individuals or very small groups engaged in work on cultural economics at the University of Paris 1 and the Erasmus University Rotterdam, but overall, there are no major dedicated centres of research in Europe. FP7 support for research on the creative industries should build networks and capacity over time, but again, this is not likely to result in the creation of major centres as opposed to sustaining networks. The USA has been influential through the work of figures such as Richard Caves and Richard Florida but the creative economy is not on the agenda there. The Queensland University of Technology in Australia is one of the best resourced centres in this area, but this is still no more than half a dozen core researchers with additional project staff. Within Scotland, a key centre is the Centre for Cultural Policy Research (CCPR), University of Glasgow.

New and emerging media

The provision at the University of Abertay in Computer Games Technology is recognised worldwide.

Visual and performing arts

There are significant levels of overall investment in creative industries research and knowledge transfer in England, Northern Ireland, Finland, New Zealand, Germany, USA and Japan. The UK is recognised as a world leader in practice based art and design research at University level, with Scotland making a significant contribution through the Glasgow School of Art, Edinburgh College of Art, Duncan of Jordanstone College of Art and Design, and Gray’s School of Art. UK art and design research is recognised as having the most mature research culture internationally, being at the forefront of postgraduate and doctoral study, and operating in an internationally recognised professional context. Scotland’s recent success in contemporary art could also be developed, and Scotland has the capacity to a viable competitor to London in contemporary art theory and research.

Design

New York, London and Milan have traditionally held important roles in the design aspects of the creative industries world, but within Scotland, there are also specific areas where we are leaders, including the advanced 3D visualisation research at Glasgow School of Art's Digital Design Studio, the University of Strathclyde and DJCAD. Scotland also has a track record in furniture design and textiles that could be built upon.

There is, however, no systematic support for practice-led research in creative disciplines or in the necessary theoretical underpinning of the creative domain. Research institutions like MIT and Stanford have internationally renowned Design Labs; Finland has the world leading Helsinki University for Art and Design; the DCMS in the UK Government has an extensive Creative Economy programme which includes investment in higher education. In Scotland there are no similar policy initiatives.

What barriers exist to exploiting the existing capability? (E.g. people, facilities, access to markets etc) What action could be taken by which actors to remove or minimise these barriers?

Cultural policy

One general barrier seems to be the absence of a fully shared vision of the creative industries, how they relate to one another, and how they can relate to the economic development of Scotland. It will require co-ordinated policy direction to support the breaking down of existing barriers that arise from fragmented visions of the creative industries and diffused and fragmented provision of postgraduate study in these areas. At present, it could be argued that there are too many agencies operating independently and without reference to each other, using different definitions and prioritising different aspects of the creative industries. The Scottish Government should agree a coherent creative industries strategy cutting across Government departments and agencies with higher education at its core. A creative industries forum bringing together all the policy makers, agencies and the main HEIs involved in creative industries should be part of that strategy.

Research funding

The comparatively low levels of funding for research in this sector are also a barrier. Creative industries research is still relatively young in comparison with the STEM (science, technology, engineering and medicine) disciplines and has, therefore, less critical mass from which to develop. As a result, RAE performance, although improving, is still not at the level of STEM and results in relatively low levels of SFC Quality Research Funding. This means that the reliance on Strategic Research Development Funding and SRIF is higher than in other disciplines, but the level of this funding is declining. The AHRC is the smallest Research Council and the Scottish Arts Council and Scottish Screen do not traditionally invest in academic research. The recent decision of the AHRC to allocate postgraduate studentships on the basis of track record will also result in the creative and performing disciplines being disadvantaged and their growth potential undermined.

AHRC now accepts research applications from a few narrowly defined analogue institutions (Independent Research organisations- IRO), such as national museums. However, the opportunities open to cultural organisations outside the higher education sector, and even some within it, such as university museums and galleries, to seek or

participate in research remains severely restricted. The arts and cultural sector is made up of diverse and relatively small organisations most of which currently have very limited capacity to initiate or carry out broadly conceived research. The modest scale of most arts organisations and their hand-to-mouth existence forces them to focus on their core business and to undertake very tightly focussed research and development, however valuable more broadly based research might be in strategic advocacy.

Some of the most effective research also involves collaboration between academic researchers and creative arts professionals. However, funding criteria which supports the academic partner may exclude the practitioner and vice versa. The artist/practitioner who is not attached to any institution is, for all intents and purposes, a commercial freelance operator, who often cannot secure funding through traditional sources. There is currently little provision for cross-over collaborations of this kind between the two sectors, even more so if the artist/practitioner is not a large business but a sole trader.

Knowledge transfer

It is argued that the new Knowledge Transfer (KT) metrics introduced by SFC in 2004-5 are insensitive to creative industries and have resulted in a minimal and declining stream of SFC KT funding to the art schools despite their income from knowledge transfer activity increasing. There are also no specific research or knowledge transfer funds available in Scotland which are specific to the creative industries other than the SFC Small Cultural Engagement Fund which is allocated formulaically. The Small Specialist Institutions, therefore, despite being wholly creative bodies, receive the minimum allocation and Grays College and DJCAD largely lose out on this funding stream within their host Universities, as the funding is not 'ring fenced' and they have to bid for it in competition with other users from their University's STEM departments.

The UK Knowledge Transfer Partnerships are currently underused by creative industries because the level of contribution required from the host business/organisation and the bureaucracy involved act as a disincentive to creative industries, the majority of which are small and micro businesses. The Scottish and UK Governments could work together to introduce a special Knowledge Transfer Partnership programme geared to the particular characteristics of the creative industries. The Scottish Government could also promote its schemes such as SEEKIT and SCORE, which support research and knowledge transfer linkages between HIEs and businesses, more extensively to the creative industries. The Work Foundation Report '*Staying Ahead: the economic performance of the UK's creative industries*' describes the drivers of the creative industries (outlined below), and these all need to be addressed in a Scottish context:

- Demand: increasing demand for goods and services nationally, UK and globally
- Education and Skills – developing a highly skilled workforce (see work of Creative & Cultural Skills Sector Council)
- Diversity – need for cognitive diversity
- Networks – promoting collaborative networks and places
- Public investment for creativity and innovation
- Business building capacity
- Intellectual property – understanding issues relating to copyright and changing business models in a digital age

- A level playing field – more market analysis of creative industrial structures – role of ‘gatekeepers’.

At present, there is a market failure at the level of start up funding for emergent and micro businesses in the sector which receive no financial support from the Enterprise companies and only generic advice from Business Gateways, currently under re-organisation. The SAC Cultural Enterprise Offices can give customized business advice and training but can offer no financial resources. In this context, NESTA is running a 3-year pilot programme, ‘Starter for 6’, which offers training and financial support up to £10,000.

Are there key elements of policy or structure which are currently not present in Scotland and which should be developed?

Debate about the Scottish creative industries should be conscious of current and future intervention in markets and market trends. Since the market appears to favour London’s interests in some sectors of the creative industries within the UK, a frequent response has been to consider, and sometimes to operate, compensatory mechanisms, such as broadcasting quotas for regional production centres. There is a larger question, in relation to the encouragement of cultural enterprise in Scotland, as to what sorts of initiatives, including for example tax breaks, should be at the disposal of Holyrood. Many commentators have observed that the uneven production of a ‘national cultural policy’ has been limited by lack of oversight specifically of media and communication matters at the Scottish Parliament. The cultural and social benefits of incentives provided by countries such as Ireland, and how they are perceived by the world at large, are likely to exceed their actual cost, and if implemented in Scotland will demonstrate that ‘Creative Scotland’ is more than just a slogan.

In the books and publishing sector, encouragement to Scottish publishers and small presses would greatly assist the promotion of Scottish creative artists and writers, present and past. Scotland’s current publishing base only provides a limited opportunity for such a literate and developed a culture, and in the light of its place in the history of periodical and book culture within the Anglophone world, especially in the eighteenth and nineteenth centuries, it looks especially meagre. Encouragement could also be given to the reappearance of university press imprints to join Edinburgh and Dundee University presses.

How do existing and developing research collaborations within Scotland affect the potential for developing this area? Are there existing or potential collaborations beyond Scotland that might usefully be supported?

A significant amount of the research undertaken in the creative disciplines involves collaboration and networks but these are often with institutions and organisations outwith Scotland. For example:

- All of Scotland’s Art Colleges currently have research collaborations with a variety of institutions across the UK and overseas, including countries such as China, Japan, Russia, USA, Canada, Finland, Iceland, and Australia.
- The Institute for Capitalising on Creativity at the University of St. Andrews is a collaboration of the School of Management, University of St Andrews; Duncan of Jordanstone College of Art and Design, University of Dundee; University of Abertay and the Royal Scottish Academy of Music and Drama. It

has a number of international links, including Copenhagen Business School, Queensland University of Technology, Australia, University of Innsbruck and the Tisch School of the Arts, New York University.¹⁶

- The Visual Arts Research Institute, established in 1999 as a consortium consisting of: the University of Edinburgh, The National Galleries of Scotland, The National Museums Scotland, Edinburgh College of Art, The University of St. Andrews, and The University of Glasgow
- Nozomi: a collaboration of Edinburgh College of Art, the School of Fine Art, Faculty of Duncan of Jordanstone College of Art and Design at the University of Dundee, and partners in Japan.
- The Glasgow Urban Lab, being developed by Glasgow School of Art in partnership with Glasgow City Council, Architecture and Design Scotland and the Lighthouse
- ScotMARK: based at Edinburgh College of Art includes the six Schools of Architecture and main school of the built Environment across Scotland.
- The Scottish Government Evidence in Culture, Sport and related Tourism Network (ECSnet), with National Library of Scotland, National Museums Scotland, Scottish Arts Council, Scottish Government, Scottish Library and Information Council, Scottish Museums Council, Sportscotland, VisitScotland, Historic Scotland and Architecture and Design Scotland.
- CARA: a collaboration of DJCAD, Edinburgh College of Art and the Department of Architecture, University of Edinburgh

It has been argued that while research pooling may work for disciplines such as Economics and Physics, a distinctive character of research in the creative disciplines is the continued success of the lone scholar model¹⁶. Instead, there would be merit in a stream of funding to support the development of international and inter-disciplinary networks. They take an amount of time and energy to establish which is often not acknowledged in the level of funding provided to networks themselves. For example, there is the ESRC-funded cultural industries network coordinated by the LSE, the purpose of which has been to develop a research agenda for the creative industries at UK level. This kind of effort has helped make people more aware of current work around the UK and provide a sense of creative industries as a coherent area for academic study.

The AHRC is involved with Humanities in the European Research Area (HERA)¹⁷, described on its website as 'a partnership between fifteen Humanities Research Councils across Europe and the European Science Foundation, with the objective of firmly establishing the humanities in the European Research Area and in the 6/7th Framework Programmes.' One of the two programmes which are at the development stage for HERA is 'Humanities as a Source of Creativity and Innovation'. There should, therefore, be an opportunity for Scottish researchers to benefit from collaboration with European partners in addressing some of these issues as they relate to the Creative Industries.

The conferral of 'academic analogue' status by the Arts & Humanities Research Council is an important factor in the development of combined doctoral programmes

¹⁶ AHRC Response to the White Paper on the Future of Higher Education (http://www.ahrc.ac.uk/about/policy/response/ahrb_response_to_the_white_paper_on_the_future_of_higher_education.asp)

¹⁷ <http://www.heranet.info/Default.aspx?ID=102>

and research bids across academic and academic analogue institutions south of the border. It might be possible to develop more advanced study of Scottish collections through the inclusion of the collections in Scottish Art Galleries and Museums, as is currently being done in the RSE awards.

What might the Scottish Funding Council do which could enhance the research and knowledge exchange activities in the creative industries and creative economy?

The SFC could change the profile of current research in Scotland, and it would be timely to do so as the country moves to develop devolved policies on the creative industries. To date London has not succeeded in achieving a major take-off at an academic centre or grouping of centres. Given the scattered nature of the effort UK-wide, there could well be a comparative advantage if Scotland were to invest in this area of research. In Scotland, the scatter of effort is considerable, and to achieve a more significant presence internationally, selective support for the leading centres, or networks and alliances, would be a sensible way ahead. Queensland University of Technology in Australia has achieved a global presence with a relatively small but consistent annual investment stream over the past few years.

In addressing this sector, the SFC could introduce:

- a stream of Strategic Research Development Funding for creative industries/creative discipline research which recognises the need to build research culture and critical mass. This could include a light touch fund for feasibility studies available throughout the year and with a fast response time.
- a stream of Capital Funding - a version of Science Research Infrastructure Fund to meet the significant capital requirements of creative industries disciplines.
- increased funding support available for taught and research postgraduates in creative disciplines to build the research culture and critical mass in creative industries.
- funding to promote and develop major collaborative research projects between HEIs and Cultural Institutions.
- funding to facilitate the pooling of resources, both human and financial, among existing networks of excellence in cultural policy research

Annex 1

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