

# AR STÒRAS GÀIDHLIG

The economic and social value of Gaelic as an asset  
- Full Report  
May 2014

## CONTENTS

EXECUTIVE SUMMARY .....	3
1. INTRODUCTION .....	21
2. BACKGROUND AND CONTEXT: UNDERSTANDING THE ROLE OF GAELIC.....	29
3. ROLE OF GAELIC AS AN ECONOMIC AND SOCIAL ASSET: AN OVERVIEW .....	55
4. ROLE OF GAELIC AS AN ECONOMIC AND SOCIAL ASSET: KEY EXAMPLES .....	78
5. WIDER LINKAGES & INTER-RELATIONSHIPS BETWEEN GAELIC DEVELOPMENT AND ECONOMIC/SOCIAL DEVELOPMENT .....	107
6. QUANTIFYING THE ECONOMIC VALUE OF GAELIC AS AN ASSET.....	117
7. LOOKING FORWARD: ENHANCING THE USE OF GAELIC AS AN ASSET.....	138
ANNEX 1: APPROACH AND METHOD FOR THE RESEARCH .....	149
ANNEX 2: LIST OF INTERVIEW CONSULTEES, FOCUS GROUP ATTENDEES, AND STEERING GROUP MEMBERS.....	160
ANNEX 3: REFLECTIONS FROM THE RESEARCH TEAM .....	164
ANNEX 4: RELEVANT HISTORICAL CONTEXT.....	167
ANNEX 5: REFERENCES.....	171
ANNEX 6: MATRIX SUMMARY OF BUSINESS CHARACTERISTICS OF THOSE QUANTIFYING VALUE OF GAELIC .....	176

### Acknowledgements

The research team would like to acknowledge the contributions of various organisations, businesses and individuals to this research study. This includes the members of the Steering Group, the one-to-one interviewees, and the focus group attendees (see Annex 2 for a list of the specific individuals, organisations, and businesses involved in each of these). In addition this also includes the individual case study organisations and businesses (Section 4 of the Report) and also the respondents to the various surveys that formed part of this research study. All of these individuals made important contributions to various aspects of this study and their time and commitment is very much appreciated.

Finally, the research team would also like to pay tribute to David Pirnie – a member of the research team for this study who sadly passed away earlier this year. His contribution to this particular study, as well as a range of other studies involving this same research team, is much appreciated and he will be sadly missed.

## EXECUTIVE SUMMARY

### Introduction

DC Research (working in partnership with Glasgow Caledonian University, Cogent Strategies International Ltd and Pirnie Ltd) were commissioned by Highlands and Islands Enterprise (HIE) in partnership with Bòrd na Gàidhlig, Creative Scotland, Scottish Natural Heritage, The Highland Council, Argyll and Bute Council, and Comhairle nan Eilean Siar to carry out the research project: **Economic and Social Value of Gaelic as an Asset**.

The overarching aim of this research was to **consider, evaluate and robustly evidence the current and potential use of Gaelic as an asset to the economy and society of the Highlands and Islands and Scotland as a whole**.

Overall, the research has attempted to assess the role of Gaelic as an economic and social asset, and the specific remit of the research is acknowledged as being a **crucial first step in researching and evaluating this area of Gaelic development**. As such, this research should be regarded as an **initial, baseline study** which has sought to explore and assess the current (and potential) role of Gaelic as an asset economically and socially and, where possible, to **quantify the value of Gaelic as an asset**.

However, this does not mean that the research is comprehensive, nor that it forms a census of all of those using Gaelic as an asset. The research has however achieved good coverage of the relevant business and social community, and has been **able to construct an evidence base around Gaelic's role as an asset, as well as develop a range of case study examples of businesses and organisations where Gaelic adds value and is used as an asset**. However, there is no doubt that there are many more examples not included/covered in this research where Gaelic is being used as an asset to add value to a transaction – social and/or economic.

### Understanding the role of Gaelic

**Gaelic has shown a remarkable resilience** in the face of challenges set against it historically and in the modern era, and is **showing encouraging signs of renewal in certain demographics**.

According to the 2011 Census, there are 57,375 Gaelic speakers in Scotland (approximately 1.1% of the population). By far the highest concentration is in the Outer Hebrides, followed by Skye and Lochalsh, the offshore islands of Argyll and Bute, the rest of the Highlands and of Argyll and Bute and specific areas in other authorities. Due to a long term shift towards urban areas there are now in the region of 10,000 speakers of Gaelic in the greater Glasgow area, and likewise a substantial number in the Edinburgh area (almost 6,000). **Overall, according to the Census approximately 87,000 individuals were claimed to have 'some knowledge of Gaelic' in 2011.**

There is a substantial feeling of goodwill towards Gaelic shown by the majority of the Scottish people as expressed in public attitude surveys (e.g. Attitudes Towards the Gaelic Language, 2011). In general this is also being expressed in the tone in which Gaelic is discussed in the press.

Benefits of Gaelic in helping decode Scotland's past and in general the benefits of bilingualism within Scottish society are also being increasingly acknowledged.

**Gaelic Language Plans are now allowing local approaches to Gaelic to be discussed** although much still remains to be done in terms of developing and implementing successful strategies regarding capacity building. The changing nature of Gaelic communities in Scotland, within and outwith the traditional Gàidhealtachd are throwing up new challenges to policy and also new opportunities amongst the ‘New Gaels’ in Scotland.

The **positive role that Gaelic, in particular Gaelic arts and cultural activities, can play in economic activities**, particularly in the media and in events such as Celtic Connections, **are now generally acknowledged by policy makers**, although more needs to be done to broaden and increase this awareness. Issues of skills accreditation remain, as do attitudinal issues regarding domains in which Gaelic is not yet seen as being used, or having the potential to be used, as an asset.

The problems facing Gaelic as a minority language within a context of majority English use are not limited to Gaelic alone, but are encountered by other minority languages such as Welsh and Irish. Despite this, a positive framework can be developed around a **‘linguistic political economy of development’** where language, culture and development can co-exist positively and work with each other.

## Key Findings

In total, the primary research elements of this study consulted with, or received responses from, more than 300 businesses, enterprises and organisations – around two-thirds (more than 200) from the surveys, and more than one-third (120) from the focus groups and interviews. This primary research has achieved coverage of the key geographic locations, the key sectors (focusing on key sectors where previous research suggests Gaelic is used as an asset), and has covered both the economic and social dimensions of Gaelic as an asset. More information about the representativeness of the respondents is included in Annex 1 to the report.

The research findings highlight the **scale of the use of Gaelic** by businesses (more than 60% of respondents use Gaelic as a key element), the **value that using Gaelic can add** to businesses and community organisations (70% of businesses surveyed regard Gaelic as an asset to their business), and the **types of benefits that using Gaelic provides** to businesses (enhancing *distinctiveness/uniqueness* of products and services, enhancing perceptions of *authenticity and provenance*, and *increasing appeal* of products/services to *target markets*).

- More than half the businesses (60%) and 85% of community organisations surveyed stated that **Gaelic is used, or features, as a key element of their main activities**, products or services.
- Almost two-thirds of businesses consulted describe Gaelic as moderately, very, or critically important, and more than half the community organisations stated that Gaelic is critically important.
- **Businesses that identified Gaelic as being *critically important* are most commonly in creative industries sectors** (e.g. music, art, design, performance, theatre, media, publishing, digital/ICT). Other businesses that identify Gaelic as critically important include those in the **heritage and learning sectors**.

- Almost **70% of businesses consulted said that Gaelic is an asset** to their main business/enterprise activity, with the greater representation of these being in **creative industries, heritage, education/learning and community sectors**.
- Commonly represented sectors within the **84% of community organisations who state that Gaelic adds real value to their organisation** are **creative industries** (especially music), alongside Gaelic **learning and other education**, as well as community development and **heritage** organisations.

The ways in which Gaelic is used by businesses and enterprises are varied, from being the focus of the enterprise to offering an add-on or enhancement to specific aspects of the enterprise. Common ways in which Gaelic is used include:

- **Gaelic as the explicit heart/core of the business** – where Gaelic (as a language, as well as Gaelic music, Gaelic heritage, Gaelic events, etc.) is fundamental to the enterprise.
- **Gaelic as an inherent/implicit element of the business** – where Gaelic (language, culture and heritage) has influenced and inspired the enterprise or business owner.
- **Gaelic being used within the business or product names** – including for business names, product or service names, branding, company logos, etc.
- **Gaelic being used in signage for the business** – either on its own, or in bilingual signage.
- **Gaelic's use in advertising, promotion & marketing** – either on its own or bilingually.
- **Gaelic being used to enhance the experience of the service or product** – for visitors (e.g. to museums and heritage sites), customers, etc.
- **Gaelic being used to make events, performances, etc. bilingual** – i.e. Gaelic language being a key part of events, performances, festivals, etc.
- **Gaelic as the language of the workplace** – where Gaelic is the language of communication between staff within the business.
- **Gaelic as the language of external communication** – where Gaelic is used in communication between staff and customers, staff and suppliers, etc.

The research highlights **the (two-way) inter-relationship between Gaelic and economic and social development** – the role of Gaelic in supporting economic and social development and also the role of economic and social development in supporting Gaelic. Key themes that emerge around these issues, and about the wider inter-relationships between Gaelic and economic development include:

- The importance of positively treating Gaelic as an economic and social asset.
- Acknowledgement that it is jobs and the economy that can help to drive the development of Gaelic, more than the use of Gaelic on its own that can help to drive the economy.
- The importance of normalisation of the language, including the use of Gaelic by businesses, but also more generally (e.g. in the media), in education (i.e. Gaelic Medium Education) and in wider society.

- There is a growing belief in firms and organisations using Gaelic that this itself (business and organisation use of Gaelic) further positively reinforces impacts within Gaelic-speaking communities.

The three aspects that are the most common **major benefits** for businesses from using Gaelic as an asset are that it:

- **Enhances the distinctiveness/uniqueness of products/services.**
- **Enhances customer perceptions of authenticity and provenance of products/services.**
- **Increases the appeal of products/services to target markets.**

Gaelic was a **critical factor/driver** in the establishment of just over one-fifth of businesses/enterprises surveyed, and more than half of the community organisations.

More than 60% of businesses stated that business use of/association with Gaelic **enhances the value of Gaelic in the community**, and the pattern is even stronger within community organisations.

The inter-relationship between Gaelic use by businesses and Gaelic development is evidenced in the research which shows that business use of Gaelic:

- ...increases the **profile** of the language (70% of respondents strongly agree).
- ...increases **awareness** of the language (70% of respondents strongly agree).
- ...increases the **social value** of the language (52% of respondents strongly agree).
- ...increases the **pride** in the communities (51% of respondents strongly agree).

In terms of the **social value** of Gaelic, the primary research has highlighted and emphasised the role of Gaelic in this regard, and has provided additional evidence that supports some of the key social dimensions of Gaelic identified in previous research – such as self-confidence (individually and at the community level); pride in the communities; attachment of people to their communities; and increases in Gaelic-related job opportunities.

In addition, the case studies include examples where the social value of Gaelic is both a key reason for using Gaelic by the enterprise or organisation and is also an outcome of using Gaelic by the organisation or business.

The community organisation survey also provides evidence of various aspects around the social value of Gaelic – with more than three-quarters of survey respondents stating that their use of Gaelic **increases the profile, awareness, use, appreciation, and social value of the language.**

In addition the majority of community organisation respondents agreed or strongly agreed that the use of Gaelic by community organisations **increased pride in local communities** (72%); increased the **attachment of people to their communities** (64%); and **increased Gaelic related job opportunities** (61%). Additionally, more than half of businesses that replied to the business survey believe that their use of Gaelic helps increase the social value of the language.

## Opportunities to use Gaelic as an asset

Whilst Chalmers and Sproull's (2006) comprehensive survey about the demand for Gaelic goods and services primarily dealt with the arts, it would **suggest a notable level of untapped demand for Gaelic goods and services** in general, constrained more by availability rather than factors such as consumers' Gaelic fluency. This suggests that a target market, particularly for artistic goods, but not limited to that market, should not be seen as restricted to those who consider themselves as Gaelic speakers.

In terms of **additional opportunities to use Gaelic as an asset** – the majority of businesses that already regard Gaelic as an asset also see additional opportunities to enhance their business, whilst (conversely) the majority of those that do not currently regard Gaelic as an asset, do not see any opportunities to make use of Gaelic to enhance their business. **Sectors that are more likely to recognise there are opportunities include creative industries, education and learning, heritage and tourism.**

- Many consultees regard **tourism** and the various opportunities within this sector to be one of the main areas where there is strong potential to enhance and develop the role of Gaelic as an economic asset. Tourism opportunities can relate to two distinct markets, **a Gaelic speaking/learning market** (i.e. 'internal Gaelic tourism'), and **also a more general (national/international) market where the role of Gaelic is about enhancing the distinctiveness, differentiation, and the appeal to tourists of visiting specific locations** (especially island locations) within Scotland (in effect a 'volume market').
- Within the **creative industries** opportunities relate to the further development of the wide range of artistic, drama, literature, music and events and festivals related activity currently taking place through businesses and organisations – both those that communicate and express themselves (either mainly or exclusively) in Gaelic, and those for whom Gaelic is used as an enhancement or a feature.
- The role of **education and learning** is regarded by many consultees as being critical to the future development opportunities around Gaelic as an economic and social asset, and also the general language development for Gaelic.

The key barriers and challenges in terms of realising these opportunities include:

- **The availability of job and employment opportunities**, especially for young people.
- The general **capacity and resources** of businesses (and community organisations) – limiting their ability to increase the use of Gaelic due to capacity issues (staff ability and time), as well as resources required to develop the role of Gaelic in the business.
- **The existing (lack of) Gaelic knowledge and expertise** within the business or organisation. A lack of Gaelic (i.e. of Gaelic speakers and/or Gaelic literates) is a well-recognised barrier by many businesses – on both the supply side and demand side. Also, a lack of Gaelic speakers with the relevant, specific skills for the business.
- **Cultural barriers and issues** – relating to actual and perceived issues around confidence, resistance to change, lack of priority and support given to Gaelic, lack of awareness within businesses about the potential for Gaelic, concerns around tokenism and narrow treatment of Gaelic as an economic asset.

The anticipated impacts and benefits of realising these opportunities include:

- **Profile and awareness benefits to the business** (public awareness and credibility).
- **Direct economic impacts on business** (such as additional custom/increased turnover, increased audiences/visitors, creating new jobs).
- **Mutual benefits to business and community** (enhancing experiences; wider benefits from helping promote and sustain the language; better connectivity with the local area and its history; economies of scale; increased educational opportunities).
- **Normalisation of Gaelic/support for Gaelic** (increases in the quantity and quality of Gaelic exposure).

As such, the potential opportunities are anticipated to clearly benefit the individual businesses, as well as the communities where the businesses are located, and the wider language development for Gaelic – reinforcing and further evidencing the two-way inter-relationship between Gaelic and economic and social development mentioned previously.

### Quantifying the economic value of Gaelic as an asset

The study sought to quantify the value of Gaelic as an asset; however, the **results only capture some aspects of the quantifiable value of Gaelic** as an economic asset, and the results **should not be regarded as comprehensive or representative of the wider economy**.

Whilst **70% of businesses surveyed stated that the use of Gaelic represents an asset** to their main business/enterprise activity, the **majority of these businesses are not able to provide quantitative estimates of the value** of this.

Around **one-third of businesses that regard Gaelic as an asset were able to provide some measurement of the value of Gaelic to the business**, and an analysis of the data provided (and excluding key Gaelic organisations reliant on public sector support from the data to allow the analysis to focus on private sector businesses) found that, **for these 34 enterprises, the turnover attributed to the impact of Gaelic is almost £4million**. Alongside this (and again excluding key Gaelic organisations reliant on public sector support from the data to allow the analysis to focus on private sector businesses), **the increase in the number of people employed attributed to the impact of Gaelic for the 18 businesses able to measure this is 47 FTE jobs**.

Overall, the businesses for whom Gaelic is an asset and that are able to quantify the value of Gaelic to the enterprise commonly have the following characteristics: they are located within **Eilean Siar or Highland**, they are working in the **creative and cultural** industries, and they are **micro-businesses**.

A second level of analysis used a **matching process** through which businesses recognising Gaelic as an asset but not able to provide measures of the value were matched with businesses able to provide values on a case-by-case basis. In order to find the most appropriate match, the **process involved seeking a match against four criteria** – i.e. matching businesses between the two groups based on: recognition of Gaelic as an asset, geographic location, sector, and business size.



Adopting this process provided matches for 17 businesses/enterprises that identified Gaelic as an asset but did not quantify the value (all of which are located in Eilean Siar). This enabled the following estimates to be made of the value of Gaelic as an asset to these businesses/enterprises:

- Turnover: £1.7 million (leading to a combined total of £3.1 million for Eilean Siar when the matched respondents and original respondents<sup>1</sup> are added together).
- Employment: 11 FTE jobs (leading to a combined total of 36 FTE jobs for Eilean Siar when the matched respondents and original respondents<sup>2</sup> are added together).

In summary, taking the results from the 34 enterprises able to quantify the value of Gaelic to their business and the results from the 17 enterprises included in the matching process together, the **turnover attributed to the impact of Gaelic for these 51 businesses/enterprises is around £5.6 million.**

An assessment of the **potential economic value to the wider economy of Gaelic as an asset** was carried out, **based on a number of key assumptions and caveats.** The analysis combined the relevant survey results with data from the 2011 Census about Gaelic ability, and also with data from the Scottish Government about the size of the Growth Sectors.

The key assumptions and caveats underpinning this assessment were:

- A focus only on three key sectors where Gaelic is recognised as being used as an asset: the **creative industries; tourism (including heritage); and food and drink.**
- Using the primary research findings from those able to quantify the value of Gaelic as an asset to provide an **average (34.6%) and median (20%) percentage value of turnover that businesses attribute to Gaelic** and applying this to the wider economy.
- In the absence of other suitable evidence about the scale of use (i.e. the number of businesses in the wider population that do use Gaelic as an asset but that did not respond to the survey or engage in the primary research elements of this study) the most recently released data from the 2011 Census about Gaelic language skills at the local authority level has been used as a **proxy measure to estimate and appropriately weight the potential scale of the value of Gaelic as an economic asset.**

It should be acknowledged that this **approach is effectively underpinned by a rationale that assesses what the value of Gaelic would be if the results of the survey were replicated across the key sectors in the economy where Gaelic is recognised as an asset,** using the scale of Gaelic ability in each area as a weighting. Therefore, **the results below should be regarded as giving an indication of what the benefits of Gaelic as an asset could be to Scotland if the survey results were replicated across the wider economy.**

<sup>1</sup> This excludes the turnover and employment of key Gaelic organisations that are reliant on public sector support, which would substantially increase this figure of £3.1 million towards £15 million.

<sup>2</sup> This excludes the turnover and employment of key Gaelic organisations that are reliant on public sector support, which would markedly increase this figure of 36 FTE jobs towards 65 FTE jobs.

Adopting this approach, and applying it to Growth Sector statistics for 2011 (the most recently available data) allows an estimate of turnover to be developed for the three Growth Sectors – Creative Industries (including digital), Food and Drink (excluding agriculture) and Sustainable Tourism (Tourism related industries). The results show that in total, the **potential economic value of Gaelic as an asset to the Scottish economy could be in the region of between £81.6 million and £148.5 million.**

In general, for many businesses there are both **practical and conceptual difficulties in attempting to provide any quantitative assessment of the value of Gaelic to their business.**

Given the implications of these findings for this study, consideration can be given to various actions to address these issues: (i) develop **processes through which additional primary data can be collected** from businesses that use Gaelic; (ii) develop **support processes/systems** through which businesses can develop and implement ways to measure the value of Gaelic; (iii) **educate and inform businesses** about the benefits to them (and the general benefits) of being able to quantify the value of Gaelic; (iv) **systematise the collection of relevant data from businesses**; (v) **make use of additional data due to be released in the future from the 2011 Census**, allowing a better understanding of the role of Gaelic as well as informing how the value of Gaelic can be quantified in a more robust and systematic way.

### Examples of Gaelic as an Economic and Social Asset

The report includes a range of case studies that provide profiles and examples of individual businesses, organisations and 'sectors' that use Gaelic as an asset. These case study summaries highlight examples where Gaelic is an asset and adds value to the business, organisation or sector and include coverage of the main types of business and organisation where Gaelic is an asset, as well as the main sectors where Gaelic is recognised as adding value (or having the potential to add value).

Individual Case Studies	Sectoral Overviews/Case Studies
<ul style="list-style-type: none"> <li>• An Lanntair, Stornoway</li> <li>• Aros Visitor Centre and Arts Centre, Skye</li> <li>• Celtic Connections, Glasgow</li> <li>• Facal, Sutherland</li> <li>• Fèisean nan Gàidheal and Blas</li> <li>• HebCelt Festival, Stornoway</li> <li>• Media nan Eilean (mneTV), Glasgow</li> <li>• Port Charlotte Hotel, Islay</li> <li>• Praban na Linne, Isle of Skye</li> <li>• Sabhal Mor Ostaig, Isle of Skye</li> <li>• Sealgar, Isle of Lewis</li> <li>• Seallam Visitor Centre, Northton, Harris</li> <li>• Storas Uibhist</li> <li>• Taigh Chearsabhadh, North Uist</li> </ul>	<ul style="list-style-type: none"> <li>• Gaelic Cultural Hubs</li> <li>• Gaelic Publishing Sector</li> <li>• Gaelic Media Sector</li> <li>• Gaelic and Scotch Whisky</li> <li>• Tourism Sector</li> </ul>

## AITHISG DEIREANNACH

### Ro-ràdh

Chaidh coimisean a thoirt do DC Research (ag obrachadh ann an com-pàirteachas le Oilthigh Cailleanach Ghlaschu, Cogent Strategies Eadar-nàiseanta Earr. agus Pirnie Earr.) le Iomairt na Gàidhealtachd 's nan Eilean (HIE) ann an com-pàirteachas le Bòrd na Gàidhlig, Alba Cruithachail, Dualchas Nàdair na h-Alba, Comhairle na Gàidhealtachd, Comhairle Earra-Ghàidheal agus Bhòid, agus Comhairle nan Eilean Siar gus pròiseact rannsachaidh a ghabhail os làimh: **Luach na Gàidhlig mar So-mhaoin Eaconamach is Shòisealta.**

B' e prìomh amais ann rannsachaidh **beachdachadh, measadh agus dearbhachd làidir a dhèanamh air cleachdadh na Gàidhlig, gu làithreach agus gu comasach, mar so-mhaoin do dh'eaconamaidh agus chomann-shòisealta na Gàidhealtach is nan Eilean agus na h-Alba gu lèir.**

Gu h-iomlan, tha an rannsachadh air feuchainn ri measadh a dhèanamh air dreuchd na Gàidhlig mar so-mhaoin eaconamach is shòisealta, agus tha raon-ùghdarras an rannsachaidh air aithneachadh mar **chiad cheum chudromach ann a bhith a' rannsachadh is a' dèanamh measadh air an raon seo de leasachadh na Gàidhlig.** Mar sin, bu chòir coimhead air an rannsachadh seo mar **rannsachadh tùsail, bunasach** a tha air sireadh sgrùdadh is measadh a dhèanamh air dreuchd na Gàidhlig gu làithreach (agus gu comasach) mar so-mhaoin eaconamach agus shòisealta agus, far a bheil sin comasach, **cainneachadh luach na Gàidhlig mar so-mhaoin.**

Chan eil seo a' ciallachadh, ge-tà, gu bheil an rannsachadh ioma-chuimseach, no gu bheil e na chunntas-sluaigh den h-uile neach a tha a' cleachdadh na Gàidhlig mar so-mhaoin. Chaidh aig an rannsachadh, ge-tà, air dèiligeach ri chuibhreann mhath den choimhearsnachd gnothachais is sòisealta iomchaidh, agus bha e comasach **stèidh fianais a chur ri chèile co-cheangailte ri dreuchd na Gàidhlig mar so-mhaoin, cho math ri raon de dh'eisimpleirean sgrùdaidh-cùise a chruthachadh le gnothachasan is buidhnean far a bheil Gàidhlig a' cur ri luach agus air a cleachdadh mar so-mhaoin.** Chan eil teagamh an, ge-tà, gu bheil mòran a bharrachd eisimpleirean ann nach eil air an gabhail a-steach/air dèiligeadh riutha san rannsachadh seo, far a bheil Gàidhlig air a cleachdadh mar so-mhaoin gus luach a chur ri gnothach – sòisealta agus/no eaconamach.

### A' tuigsinn dreuchd na Gàidhlig

**Tha a' Ghàidhlig air tapachd iongantach a shealltainn** mu choinneamh dhùbhlain a bha na h-aghaidh gu h-eachdraidheil agus anns an latha an-diugh, agus **tha coltas ann gu bheil seallaidhean de dh'ùrachadh a' nochdadh ann an sluaigh-thomhais àraid.**

A rèir cunntas-sluaigh 2011, tha 57,375 neach-labhairt Gàidhlig ann an Alba (timcheall air 1.1% den t-sluaigh). Tha an dùmhlachd as motha, gun teagamh, ann an Innse Gall, an uair sin san Eilean Sgitheanach is Loch Aillse, ann an eileanan far-chladaich Earra-Ghàidheil is Bhòid agus ann an sgìrean sònraichte ann an ùghdarrasan eile. Air sgàth gluasad fad-ùineil a dh'ionnsaigh sgìrean bailteil, tha a-nis timcheall air 10,000 neach-labhairt Gàidhlig ann a' sgìre bhaile Ghlaschu agus mar an ceudna, deagh àireamh ann an sgìre Dhùn Èideann (faisg air 6,000). **Gu h-iomlan, a rèir a' chunntais-sluaigh, bha 87,000 neach a' cumail a-mach gun robh 'tomhas de dh'aithne aca air Gàidhlig' ann an 2011.**

Tha faireachdainn susbainteach de dheagh-ghean ann a dh'ionnsaigh na Gàidhlig bhon mhòr-chuid de mhuintir na h-Alba, mar a chaidh a chur an cèill ann an suirbhidhean air beachdan a' phobaill (m.e. Beachdan a' Mhòr-shluaigh air Gàidhlig 2011).

San fharsaingeachd tha seo cuideachd ga chur an cèill san dòigh anns a bheil a' Ghàidhlig air a deasbad anns na meadhanan sgrìobhte.

Thathar cuideachd a' faicinn barrachd aithne ga thoirt do bhuannachdan na Gàidhlig ann a bhith a' tuigsinn eachdraidh na h-Alba agus, san fharsaingeachd, do bhuannachdan dà-chànanaid taobh a-staigh comann-shòisealta na h-Alba.

**Tha Planaichean Cànan a-nis a' ceadachadh tharraingean ionadail a thaobh na Gàidhlig a dheasbad** ged a tha fhathast mòran ri dhèanamh a thaobh a bhith a' leasachadh agus a' buileachadh ro-innleachdan shoirbheachail co-cheangailte ri neartachadh chomasan. Tha an dòigh sa bheil coimhearsnachdan Gàidhlig ag atharrachadh ann an Alba, taobh a-staigh agus a-muigh na Gàidhealtachd thraidiseata, a' nochdadh dhùbhlain ùra a thaobh poileasaidhean agus cuideachd cothroman ùra am measg nan 'Gàidheal Ùra' ann an Alba.

Tha an **dreuchd dhearbhadh is urrainn don Ghàidhlig a ghabhail ann an gnìomhan eaconamach**, gu sònraichte ann an gnìomhan ealain is cultarail na Gàidhlig, agus gu h-àraid anns na meadhanan agus ann an tachartasan leithid *Celtic Connections*, **a-nis a' faighinn aithne bho luchd-dèanaimh poileasaidh**, ged a tha mòran a bharrachd a dh'fheumar a dhèanamh airson an aithne seo a mheudachadh is a leudachadh. Tha ceistean a thaobh barrantachadh sgilean fhathast gun fhuasgladh, cho math ri ceistean mu bheachdan a thaobh raointean far nach eil a' Ghàidhlig fhathast ga faicinn mar so-mhaoin, no le comas a bhith na so-mhaoin.

Chan eil na duilgheadasan a tha mu choinneamh na Gàidhlig, mar mhion-chànan ann an co-theacsa far a bheil a' Bheurla air a cleachdadh leis a' mhòr-chuid, a' bualadh air a' Ghàidhlig a-mhàin, oir tha mion-chànain eile leithid Cuimris agus Gàidhlig na h-Èireann anns an aon suidheachadh. A dh'aindeoin seo, gabhaidh frèam dearbhach a chur air bhonn co-cheangailte ri '**eaconamaidh leasachaidh cànanach poileataigeach**' far an tig cànan, cultar is leasachadh beò còmhla ann an dòigh dhearbhadh agus obraichidh iad le chèile.

### Prìomh Thoraidhean

Gu h-iomlan, rinn an rannsachadh co-chomhairle le, no fhuair e freagairt bho, còrr is 300 gnothachas, iomairt no buidheann – timcheall air dà-thrian (còrr is 200) bho na suirbhidhean agus còrr is aon-trian (120) bho na buidhnean fòcais agus agallamhan. Chaidh aig a' phrìomh rannsachadh air dèiligeadh ris na prìomh àiteachan cruinn-eòlais, na prìomh raointean (le fòcas air na prìomh raointean far an robh rannsachadh a chaidh a dhèanamh roimhe a' sealtainn gur dòcha gun robh a' Ghàidhlig air a cleachdadh mar so-mhaoin), agus tha e air dèiligeadh ris an dà chuid tomhasan eaconamach is sòisealta den Ghàidhlig mar so-mhaoin. Tha tuilleadh fiosrachaidh mu cho riochdachail sa bha an luchd-freagairt ri fhaotainn ann an Leas-phàipear 1 den aithisg.

Tha toradh an rannsachaidh a' leigeil cuideam air **sgèile cleachdaidh na Gàidhlig** le gnothachasan (còrr is 60% de luchd-freagairt a' cleachdadh na Gàidhlig mar phrìomh eileamaid), **luach a tha cleachdadh na Gàidhlig a' cur ri buidhnean** gnothachais is coimhearsnachd (70% de gnothachasan san t-suirbhidh a' faicinn a' Ghàidhlig mar so-mhaoin dhan cuid gnothachais), agus **an seòrsa buannachd a tha cleachdadh na Gàidhlig a' tabhann** do gnothachasan (a' cur ri cho *sònraichte/àraid 's* a tha stuthan is seirbheisean, a' cur ri aithneanas a thaobh *cinnteachd is tùs*, agus a' *meudachadh agartais* a thaobh stuthan/sheirbheisean do *mhargaidhean air targaid*).

- Thuirt còrr is leth de gnothachasan (60%) agus 85% de bhuidhnean coimhearsnachd gun robh **Gàidhlig air a cleachdadh, no a' nochdadh, mar phrìomh eileamaid de phrìomh ghnìomhan**, stuthan no sheirbheisean na buidhne.
- Mhìnich faisg air dà-thrian ris an deach co-chomhairle a dhèanamh gun robh a' Ghàidhlig glè chudromach, fìor chudromach no riatanach, agus thuirt còrr is leth de na buidhnean coimhearsnachd gun robh a' Ghàidhlig riatanach.
- **Tha na gnothachasan a chomharraich a' Ghàidhlig mar riatanach sa chumantas anns na raointean de ghnìomhachasan cruthachail** (m.e. ceòl, ealain, dealbhadh, luchd-cluiche, taighean-cluiche, na meadhanan, foillseachadh, ditigiteachd/ICT). Tha na buidhnean eile a tha a' comharrachadh na Gàidhlig mar riatanach a' gabhail a-steach feadhainn a th' anns na raointean **dualchais is ionnsachaidh**.
- Thuirt faisg air **70% de na gnothachasan sa cho-chomhairleachaidh gu bheil a' Ghàidhlig na so-mhaoin** dhan phrìomh ghnìomh gnothachais/iomairt aca, leis an riochdachadh a b' àirde dhiubh seo anns na **raointean gnìomhachais cruthachail, foghlaim/ionnsachaidh agus coimhearsnachd**.
- Tha na raointean a tha sa chumantas a' nochdadh anns an **84% de bhuidhnean coimhearsnachd a tha a' cur an cèill gu bheil a' Ghàidhlig a' cur fìor luach ris a' bhuidheann** a' gabhail a-steach **gnìomhachasan cruthachail** (gu h-àraid ceòl). cho math ri **ionnsachadh Gàidhlig is foghlam eile**, agus leasachadh **coimhearsnachd** is buidhnean dualchais.

Tha na dòighean sa bheil a' Ghàidhlig air a cleachdadh le gnothachasan is gnìomhachasan gu math eadar-dhealaichte, eadar a bhith mar fhòcas sa gnìomhachas gu bhith a' tabhann beagan a bharrachd do fheartan àraid den gnìomhachas. Am measg nan dòighean cumanta sa bheil Gàidhlig air a cleachdadh, tha.

Dòighean sa bheil a' Ghàidhlig air a cleachdadh le gnothachasan is gnìomhachasan:

- A' Ghàidhlig gu follaiseach aig cridhe/bun a' gnothachais – far a bheil a' Ghàidhlig (mar chànan, cho math ri ceòl Gàidhlig, dualchas Gàidhlig, tachartasan Gàidhlig, m.s.a.a.) bunaiteach dhan gnìomhachas.
- A' Ghàidhlig mar fheart dualach/fillte den gnothachas – far an robh buaidh is misneachadh aig a' Ghàidhlig (cànan, cultar is dualchas) a thaobh a' gnìomhachais no neach-seilbh a' gnothachais.
- A' Ghàidhlig air a cleachdadh airson cur ri fèin-fhiosrachadh a thaobh seirbheis no stuthan – airson luchd-tadhail (m.e. gu taighean-tasgaidh agus làraich dualchais), luchd-ceannach, m.s.a.a.

- A' Ghàidhlig air a cleachdadh airson tachartasan, cuirmean, m.s.a.a. a dhèanamh dà-chànanach – m.e. a' Ghàidhlig mar phrìomh phàirt de thachartasan, cuirmean, fhèisean, m.s.a.a.
- A' Ghàidhlig air a cleachdadh taobh a-staigh a' ghnòthachais no air ainmean stuthan - a' gabhail a-steach ainmean gnòthachais, ainmean stuthan no seirbheisean, branndadh, suaidheachantasan companaidh, m.s.a.a.
- Cleachdadh na Gàidhlig ann an sanasachd, adhartachadh & margaidheachd – leatha fhèin no gu dà-chànanach.
- A' Ghàidhlig air a cleachdadh ann an soidhnichean airson a' ghnòthachais – leatha fhèin no ann an soidhe dà-chànanach.
- A' Ghàidhlig mar chànan airson chonaltradh ris an taobh a-muigh – far a bheil a' Ghàidhlig air a cleachdadh ann an conaltradh eadar luchd-obrach is luchd-ceannach, luchd-obrach is luchd-solair, m.s.a.a.
- A' Ghàidhlig mar chànan an aite-obrach – far a bheil a' Ghàidhlig na cànan conaltraidh eadar luchd-obrach taobh a-staigh a' ghnòthachais.

Tha an rannsachadh a' leigeil cuideam air an **eadar-dhàimh (dà-thaobhach) a tha eadar Gàidhlig agus leasachadh sòisealta is eaconamach** – an dreuchd aig a' Ghàidhlig ann a bhith a' cur taic ri leasachadh eaconamach is sòisealta agus cuideachd an dreuchd aig leasachadh eaconamach is sòisealta ann an bhith a' cur taic ris a' Ghàidhlig. Tha na prìomh chuspairean a tha a' nochdadh co-cheangailte ris na ceistean sin, agus mu na h-eadar-dhàimhean nas fharsainge eadar a' Ghàidhlig is leasachadh eaconamach, a' gabhail a-steach na leanas:

- Cudromachd a bhith a' làimhseachadh na Gàidhlig gu dearbhach mar so-mhaoin eaconamach is shòisealta.
- Aithne gur e obraichean agus an eaconamaidh a chuidicheas gus leasachadh na Gàidhlig a stiùireadh air adhart, nas motha nas urrainn do chleachdadh na Gàidhlig a-mhàin an eaconamaidh a neartachadh.
- Cudromachd àbhaisteachadh a' chànain, a' gabhail a-steach cleachdadh na Gàidhlig taobh a-staigh gnòthachasan, ach cuideachd san fharsaingeachd (m.e. anns na meadhanan), ann am foghlam (i.e. Foghlam Meadhan Gàidhlig) agus sa chomann-shòisealta nas fharsainge.
- Tha creideas a tha a' sìor fhàs a' nochdadh ann an gnòthachasan is buidhnean a tha a' cleachdadh na Gàidhlig gu bheil seo fhèin (cleachdadh na Gàidhlig le gnòthachasan is buidhnean) a' sìor dhaingneachadh gu dearbhach na buaidhean taobh a-staigh choimhearsnachdan Gàidhlig.

'S iad na trì feartan as cumanta a tha nam **prìomh bhuannachdan** do ghnòthachasan bho bhith a' cleachdadh na Gàidhlig mar so-mhaoin gu bheil i a':

- **cur ri cho sònraichte/àraid 's a tha stuthan is seirbheisean.**
- **cur ri aithneanas a thaobh cinnteachd is tùs nan stuthan/seirbheisean.**
- **meudachadh agartais a thaobh stuthan/sheirbheisean do mhargaidhean air targaid**

Bha a' Ghàidhlig na **feart/adhbhar deatamach** ann a bhith a' stèidheachadh beagan a bharrachd air aon-còigeamh de na gnothachasan/iomairtean ris an do rinneadh co-chomhairle, agus còrr is leth de na buidhnean coimhearsnachd.

Thuit còrr is 60% de ghnòthachasan gun robh cleachdadh na Gàidhlig/ceangal ris a' Ghàidhlig **a' cur ri luach na Gàidhlig sa choimhearsnachd**. agus tha am pàtran nas làidire buileach taobh a-staigh bhuidhnean coimhearsnachd.

Tha t-an eadar-dhàimh eadar cleachdadh na Gàidhlig le gnothachasan agus leasachadh na Gàidhlig ri fhaicinn anns an rannsachadh, a tha a' sealltainn gu bheil cleachdadh na Gàidhlig le gnothachasan:

- ...ag àrdachadh **iomhaigh** a' chànain (70% de luchd-freagairt ag aontachadh gu làidir).
- ...ag àrdachadh **mothachadh** a thaobh a' chànain (70% de luchd-freagairt ag aontachadh gu làidir).
- ...ag àrdachadh **luach sòisealta** a' chànain (52% de luchd-freagairt ag aontachadh gu làidir).
- ...ag àrdachadh **pròis** anns na coimhearsnachdan (51% de luchd-freagairt ag aontachadh gu làidir).

A thaobh **luach sòisealta** na Gàidhlig, tha a' phrìomh rannsachadh air cuideam a leigeil air dreuchd na Gàidhlig san t-seadh seo, agus air fianais a bharrachd a thoirt seachad a tha a' cur taic ri cuid de na prìomh thomasan sòisealta den Ghàidhlig a chaidh a chomharrachadh ann an rannsachadh mar-thà – leithid fèin-earbsa (gu pearsanta agus aig ìre coimhearsnachd); pròis ann an coimhearsnachdan; an ceangal a th' aig daoine ri coimhearsnachdan; agus àrdachadh ann an cothroman cosnaidh co-cheangailte ris a' Ghàidhlig.

Cuideachd, am measg nan sgrùdaidhean-cùise tha eismimpleirean far a bheil luach sòisealta na Gàidhlig an dà chuid na prìomh adhbhar aig iomairt airson Gàidhlig a chleachdadh cho math ri bhith na thoradh air cleachdadh na Gàidhlig leis a' bhuidheann no ghnòthachas.

Tha an t-suirbhidh air buidhnean coimhearsnachd cuideachd a' tabhann fianais de dhiofar fheartan co-cheangailte ri luach sòisealta na Gàidhlig – le còrr is trì-chairteal de luchd-freagairt an t-suirbhidh a' cur an cèill gu bheil an cleachdadh den Ghàidhlig **ag àrdachadh iomhaigh, mothachaidh, cleachdaidh, meas agus luach sòisealta a' chànain**.

Cuideachd, bha a' mhòr-chuid de luchd-freagairt bho bhuidhnean coimhearsnachd ag aontachadh no ag aontachadh gu làidir gun robh cleachdadh na Gàidhlig le buidhnean coimhearsnachd **ag àrdachadh pròis ann an coimhearsnachdan ionadail** (72%); **ag àrdachadh an ceangal a th' aig daoine ri coimhearsnachdan** (64%); agus **ag àrdachadh nan cothroman cosnaidh co-cheangailte ris a' Ghàidhlig** (61%). Cuideachd, bha còrr is leth de na gnothachasan a fhreagair an t-suirbhidh gnothachais a' creidsinn gun robh cleachdadh na Gàidhlig a' cuideachadh le bhith ag àrdachadh luach sòisealta a' chànain.

## Cothroman Gàidhlig a chleachdadh mar so-mhaoin

Far an robh an t-suirbhidh cuimseach aig Chalmers is Sproull (2006) mun iarrtas airson stuthan is seirbheisean Gàidhlig a' dèiligeadh gu h-àraid leis na h-ealain, tha e **coltach gun robh ìre de dh'iarrtas ann nach deach a bhuileachadh airson stuthan is seirbheisean Gàidhlig** san fharsaingeachd, air a chuingealachadh na bu mhotha air sgàth dìth faotainn na air sgàth nithean leithid fileantachd sa Ghàidhlig aig luchd-cleachdaidh. Tha seo ag innse dhuinn gur dòcha nach bu chòir margaidh air targaid, gu h-àraid airson stuthan ealain ach gun a bhith cuibhrichte ris a' mhargaidh sin, a bhith air fhaicinn air a chuingealachadh do dhaoine a tha gam meas fhèin mar luchd-labhairt na Gàidhlig.

A thaobh **cothroman a bharrachd airson Gàidhlig a chleachdadh mar so-mhaoin** – tha a' mhòr-chuid a tha mar-thà a' meas Gàidhlig mar so-mhaoin cuideachd a' faicinn cothroman a bharrachd airson an gnothachasan adhartachadh, ged nach eil (air an làimh eile) a' mhòr-chuid nach eil an-dràsta a' meas Gàidhlig mar so-mhaoin a' faicinn cothroman airson feum a dhèanamh den Ghàidhlig airson an gnothachas adhartachadh. **Tha na roinnean a tha nas dualtaiche aithneachadh gu bheil cothroman ann a' gabhail a-steach gnìomhachasan cruthachail, foghlam is ionnsachadh, dualchas agus turasachd.**

- Tha mòran den fheadhainn sa cho-chomhairle a' meas **turasachd**, agus na diofar cothroman taobh a-staigh an raoin seo, mar aon de na prìomh raointean far a bheil comas làidir ann dreuchd na Gàidhlig mar so-mhaoin eaconamach is shòisealta adhartachadh is a leasachadh. Faodaidh cothroman san raon turasachd a bhith a' bualadh air dà mhargaidh shònraichte, **margaidh luchd-labhairt/ionnsachaidh na Gàidhlig** (i.e. turasachd Ghàidhlig a-staigh), agus **cuideachd margaidh nas coitcheann (nàiseanta/eadar-nàiseanta) far a bheil dreuchd na Gàidhlig mu bhith ag adhartachadh cho sònraichte is eadar-dhealaichte sa tha i, agus an tarraing do luchd-turais gus tadhal air àiteachan sònraichte** (gu h-àraid na h-eileanan) taobh a-staigh Alba (coltach ri 'margaidh lìonaidh').
- Taobh a-staigh nan **gnìomhachasan cruthachail**, tha cothroman a' bualadh air leasachadh a bharrachd den raon farsaing de ghnìomhan ealain, dràma, litreachais, ciùil cho math ri tachartasan is fèisean a tha an-dràsta a' tachairt tro gnothachasan is bhuidhnean – an dà chuid iadsan a tha a' conaltradh agus gan cur fhèin an cèill tron Ghàidhlig (mar as trice no a-mhàin), agus iadsan dha bheil a' Ghàidhlig air a chleachdadh mar adhartachadh no mar fheairt.
- Tha an dreuchd aig **foghlam is ionnsachadh** air a mheas le mòran den fheadhainn sa cho-chomhairle mar dheanamach dha na cothroman leasachaidh san àm ri teachd co-cheangailte ri Gàidhlig mar so-mhaoin eaconamach is shòisealta, agus cuideachd a thaobh leasachadh cànan na Gàidhlig san fharsaingeachd.



Tha na prìomh chnapan-starra is dhùbhlain a thaobh a bhith a' buileachadh nan cothroman seo a' gabhail a-steach:

- **Dith cothroman obrach is cosnaidh**, gu h-àraid do dhaoine òga.
- An **comas agus na goireasan** aig gnothachasan (agus buidhnean coimhearsnachd) – a' cuibhreachadh an comas cleachdadh na Gàidhlig a mheudachadh air sgàth duilgheadasan comais (comasan is ùine luchd-obrach), cho math ri goireasan a tha dhìth gus dreuchd na Gàidhlig sa ghnòthachas a leasachadh.
- **Na th' ann an-dràsta (dìth) de dh'eòlas is ealantas a thaobh na Gàidhlig** taobh a-staigh a' ghnòthachais no na buidhne. Tha dìth Gàidhlig (i.e. de luchd-labhairt agus feadhainn a sgrìobhas i) na chnap-starra a tha aithnichte ann am mòran ghnòthachasan – air an dà chuid taobh an t-solair is taobh an iarrtais. Cuideachd, dìth luchd-labhairt leis na sgilean iomchaidh, sònraichte a tha dhìth airson a' ghnòthachais.
- **Cnapan-starra is ceistean cultarail** – a' bualadh air ceistean fìor is mothachail a thaobh misneachd, cur an aghaidh atharrachaidh, dìth prìomhachais is taic ga thoirt don Ghàidhlig, dìth mothachaidh taobh a-staigh ghnòthachasan mu chomasan airson na Gàidhlig, uallach mu chomharradh airson an adhbhair cheàrr agus làimhseachadh cùmhang de Ghàidhlig mar so-mhaoin eaconamach.

Tha na buaidhean is buannachdan a thathar a' sùileachadh nuair a thèid na cothroman sin a bhuileachadh a' gabhail a-steach:

- **Buannachdan aithne is mothachaidh dhan ghnòthachas** (mothachadh is so-chreidsinn poblach)
- **Buaidhean eaconamach dhìreach air gnothachas** (leithid barrachd cleachdaidh/teachd-a-steach nas motha, barrachd luchd-amhairc/luchd-tadhail, obraichean ùra air an cruthachadh).
- **Buannachdan a rèir do ghnòthachais is choimhearsnachd** (a' cur ri eòlasan; buannachdan nas fharsaingeach bho bhith a' cuideachadh le togail inbhe is cumail suas a' chànain; co-cheangal nas fheàrr leis an sgìre ionadail agus a chuid eachdraidh; eaconamaidhean sgèile; àrdachadh ann an cothroman foghlaim).
- **Àbhaisteachadh de Ghàidhlig/taic dhan Ghàidhlig** (meudachadh ann an uibhir is mathas nochdadh na Gàidhlig).

Leis a sin, thathar a' sùileachadh gum bi na cothroman comasach nam buannachd do ghnòthachasan fa leth, cho math ris na coimhearsnachdan far a bheil na gnothachasan stèidhte agus an leasachadh cànan san fharsangeachd airson Gàidhlig – a' daingneachadh agus mar fhianais a bharrachd den co-dhàimh dà-thaobhach eadar Gàidhlig agus leasachadh eaconamach is sòisealta mar a chaidh ainmeachadh roimhe.

## A' cainneachadh luach eaconamach na Gàidhlig mar so-mhaoin

Bha an rannsachadh ag amas air cainneachadh a dhèanamh air Gàidhlig mar so-mhaoin; **chan eil na toraidhean, ge-tà, a' cur an cèill ach cuid de dh'fheartan a thaobh an luach a ghabhas a chainneachadh de Ghàidhlig mar so-mhaoin eaconamach, agus cha bu chòir na toraidhean fhaicinn mar chiuimseach no mar riochdachadh den eaconamaidh nas fharsainge.**

Ged a thuir 70% de na gnothachasan san t-suirbhidh gu bheil cleachdadh na Gàidhlig a' riochdachadh so-mhaoin dhan phrìomh ghnìomh den gnothachas/iomairt aca, chan eil e comasach dhan mhòr-chuid de na gnothachasan sin tuairmsean a rèir meud a thoirt seachad a den seo.

Chaidh aig timcheall air aon-trian de na gnothachasan a tha a' measadh Gàidhlig mar so-mhaoin air tomhas air choireigin a thoirt air luach na Gàidhlig dhan gnothachas, agus tha anailis dhen dàta a fhuair (a' fàgail nam prìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich a-mach às an dàta gus leigeil leis an anailis fòcas a chumail air gnothachasan san raon phrìobhaidich) a' sealltainn, airson na **34 iomairtean sin, bha an teachd-a-steach a bhathar dhen bheachd a bha a' tighinn bho bhuidh na Gàidhlig faisg air £4 millean.** Còmhla ris a seo, (agus a-rithist a' fàgail nam prìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich a-mach às an dàta gus leigeil leis an anailis fòcas a chumail air gnothachasan san raon phrìobhaidich), bha an **àrdachadh den àireamh dhaoine a bha a' cosnadh a bhathar dhen bheachd a bha a' tighinn bho bhuidh na Gàidhlig airson na 18 gnothachasan a b' urrainn seo a thomhas aig 47 obraichean ionann is làn-ùine (FTE).**

Gu h-iomlan, tha na feartan a leanas aig na gnothachasan dham bheil a' Ghàidhlig na so-mhaoin agus aig a bheil an comas luach na Gàidhlig dhan iomairt a chainneachadh: tha iad stèidhte taobh a-staigh **Eilean Siar no Gàidhealtachd**, tha iad ag obrachadh ann an gnìomhachsan **cruthachail is cultarail**, agus tha iad nam **meanbh-ghothachasan**.

Tha dàrna ìre de dh'anailis air **pròiseas maidsidh** a chleachdadh tro bheil gnothachasan, a tha ag aithneachadh Gàidhlig mar so-mhaoin ach aig nach eil an comas tomhas den luach a thoirt seachad, air am maidseadh le gnothachasan is urrainn do luachan a thabhann air stèidh cùis-thar-chùis. Airson am maidseadh as fheàrr a lorg, bha **am pròiseas a' sireadh ri maidseadh a dhèanamh mu choinneamh ceithir slatan-tomhais** – i.e. a' maidseadh gnothachasan eadar an dà bhuidhinn stèidhte air: aithne do Ghàidhlig mar so-mhaoin, làthair cruinn-eòlach, raon, agus meud gnothachais.

A' cleachdadh a' phròiseas seo, chaidh ceangal a dhèanamh ri 17 gnothachasan/iomairtean a bha ag aithneachadh Gàidhlig mar so-mhaoin ach nach tug tomhas meud air an luach (gach aon dhiubh stèidhte anns na h-Eileanan Siar). Bha e comasach na tuairmsean a leanas a dhèanamh a thaobh luach na Gàidhlig mar so-mhaoin dha na gnothachasan/iomairtean sin:

- Tionndadh: £1.7 millean (a' leantainn gu iomlan còmhla de £3.1 millean airson nan Eilean Siar nuair a tha luchd-freagairt mac-samhail agus luchd-freagairt<sup>1</sup> tùsail air an gabhail còmhla).
- Cosnaidhean: 11 obraichean FTE (a' leantainn gu iomlan còmhla de 36 obraichean FTE airson nan Eilean Siar nuair a tha luchd-freagairt mac-samhail agus luchd-freagairt<sup>2</sup> tùsail air an gabhail còmhla).

<sup>1</sup> Tha seo a' fàgail às an teachd-a-steach agus fastadh de phrìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich, a chuireadh am figear seo de £3.1 millean suas gu mòr, gu suas ri £15 millean.

<sup>2</sup> Tha seo a' fàgail às an teachd-a-steach agus fastadh de phrìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich, a chuireadh am figear seo de 36 obraichean FTE suas gu mor, gu suas ri 65 obraichean FTE.

Gu h-aithghearr, a' gabhail nan toraidhean bho na 34 iomairtean aig a bheil comas luach na Gàidhlig dhan ghnòthachas aca a thomhas agus na toraidhean bho na 17 iomairtean sa phròiseas maidsidh còmhla, tha an **teachd-a-steach a tha air aithneachadh mar bhuidh na Gàidhlig airson na 51 gnòthachasan/iomairtean timcheall air £5.6 millean.**

Chaidh measadh a dhèanamh air an **luach eaconamach comasach dhan eaconamaidh nas fharsainge de Ghàidhlig mar so-mhaoin, stèidhte air grunn de prìomh bharailean is chùnnraidhean.** Thug an anailis còmhla na toraidhean iomchaidh bhon t-suirbhidh le dàta bhon chunntas-sluaigh 2011 mu chomasan Gàidhlig, agus cuideachd le dàta bho Riaghaltas na h-Alba mu mheud na Roinnean Fàis.

B' iad na prìomh bharailean is chùnnraidhean a bha nam bun-stèidh air a' mheasadh seo:

- Fòcas air trì prìomh roinnean a-mhàin far a bheil aithne air a thoirt dhan Ghàidhlig air a cleachdadh mar so-mhaoin: na **gnìomhachasan cruthachail; turasachd (a' gabhail a-steach dualchas); agus biadh is deoch.**
- A' cleachdadh nam prìomh thoraidhean rannsachaidh bhon fheadhainn aig an robh comas luach na Gàidhlig mar so-mhaoin a chainneachadh airson **cuibheasachd (34.6%) agus àireamh meadhanail (20%) fhaighinn, fhuair e luach sa cheud de luach teachd-a-steach a tha gnòthachsan a' faighinn às leth na Gàidhlig** agus a' cur seo an cèill dhan eaconamaidh nas fharsainge.
- Às aonais fianais iomchaidh eile mu thomhas cleachdaidh (i.e. an àireamh de ghnòthachsan sa mhòr-shluagh a tha a' cleachdadh Gàidhlig mar so-mhaoin ach nach do fhreagair an suirbhidh no nach do ghabh com-pàirt anns na prìomh eileamaidean rannsachaidh) chaidh an dàta a chaidh a sgaoileadh mu dheireadh bho Chunntas-sluaigh 2011 mu sgilean cànan aig ìre ùghdarrais ionadail a chleachdadh mar **thomhas procsaidh gus tuairmse agus cuideam iomchaidh fhaighinn de sgèile chomhais luach na Gàidhlig mar so-mhaoin eaconamach.**

Bu chòir aithne a thoirt gu bheil an **dòigh-obrach seo air a' stèidheachadh gu h-èifeachdach le ceann-fàth a tha a' measadh de an luach a bhiodh aig a' Ghàidhlig nan deidheadh mac-samhail thoraidhean an t-suirbhidh fhaighinn thairis air na prìomh roinnean san eaconamaidh far a bheil a' Ghàidhlig air a faicinn mar so-mhaoin, a' cleachdadh sgèile de chomasan Gàidhlig anns gach raon mar chuibhreann. Mar sin, bu chòir coimhead air na toraidhean gu h-ìosal mar chomharra air de na buannachdan a dh'fhaodadh a bhith an cois na Gàidhlig mar so-mhaoin nan deidheadh na h-aon toraidhean fhaighinn san t-suirbhidh thairis air an eaconamaidh san fharsaingeachd.**

Le bhith a' cleachdadh an dòigh-obrach seo, agus ga chur ri staitistig Roinn Fàis airson 2011 (an dàta as ùire a tha ri fhaighinn), tha comas ann teachd-a-steach a thuiarmse gus a leasachadh airson na trì Roinnean Fàis – Gnìomhachsan Cruthachail (a' gabhail a-steach digiteach), Biadh is Deoch (às aonais àiteachais) agus Turasachd Sheasmhach (gnìomhachsan co-cheangailte ri turasachd). Tha na toraidhean a' sealltainn gum faodadh gu bheil, gu h-iomlan, an **luach eaconamach comasach aig Gàidhlig mar so-mhaoin do dh'eaconamaidh na h-Alba eadar £81.6 millean agus £148.5 millean.**

San fharsaingeachd, airson mòra ghnòthachsan tha an dà chuid **duilgheadasan practaigeach agus bun-bheachdail ann a thaobh a bhith a' feuchainn ri measadh a ghabhas a chainneachadh a dhèanamh air luach na Gàidhlig dhan ghnòthachas aca.**

Leis na builean a th' anns na toraidhean seo airson an rannsachaidh, faodar beachdachadh air diofar ghnìomhan gus fuasgadh fhaighinn air na duilgheadasan (i) **pròiseasan a chur air bhonn gus an gabh prìomh dhàta a bharrachd a thionail** bho ghnòthachasan a tha a' cleachdadh na Gàidhlig; (ii) **pròiseasan/siostaman taice** a chur air bhonn gus stiùireadh a thabhann do ghnòthachasan air mar a chuireas iad air bhonn is a chleachdas iad dòighean air luach na Gàidhlig a thomhas; (iii) **gnòthachasan fhoghlamachadh agus fiosrachadh a thoirt dhaibh** mu na buannachdan a th' ann dhaibhsan (agus na buannachdan san fharsgaingeachd) nam biodh comas aca luach na Gàidhlig a chainneachadh; (iv) **an cruinneachadh de dhàta iomchaidh a thathar a thionail bho ghnòthachasan eagarachadh**; (v) **feum a dhèanamh de dhàta a bharrachd a tha ri sgaoileadh san àm ri teachd bhon Chunntas-sluaigh 2011**, a' tabhann tuigse nas fheàrr air dreuchd na Gàidhlig cho math ri bhith a' toirt fiosrachadh air mar a ghabhas luach na Gàidhlig a chainneachadh ann an dòigh nas làidire agus nas eagarach.

### Eisimpleirean de Ghàidhlig mar So-mhaoin Eaconamach is Shòisealta

Tha an aithisg a' gabhail a-steach raon de sgrùdaidhean-cùise a tha a' tabhann cunntasan is eisimpleirean de ghnòthachasan, bhuidhnean agus 'roinnean' fa leth a tha a' cleachdadh Gàidhlig mar so-mhaoin. Tha na gearr-chunntasan de sgrùdaidhean-cùise a' leigeil cuideam air eisimpleirean far a bheil a' Ghàidhlig na so-mhaoin agus a' cur luach ris a' ghnòthachas, bhuidheann no roinn agus tha iad a' gabhail a-steach na prìomh sheòrsachan gnìomhachais is buidhne far a bheil a' Ghàidhlig na so-mhaoin, cho math ri na prìomh roinnean far a bheil aithne ga thoirt dhan Ghàidhlig airson a bhith a' cur ri luach (no aig a bheil an comas cur ri luach).

Sgrùdaidhean-cùise Fa Leth	Gearr-chunntasan Raoin/Sgrùdaidhean-cùise
<ul style="list-style-type: none"> <li>• An Lanntair, Steòrnabhagh</li> <li>• Ionad Luchd-turais is Ealain Àrois, An t-Eilean Sgitheanach</li> <li>• Celtic Connections, Glaschu</li> <li>• Facal, Cataibh</li> <li>• Fèisean nan Gàidheal agus Blas</li> <li>• Fèis HebCelt, Steòrnabhagh</li> <li>• Media nan Eilean (mneTV), Glaschu</li> <li>• Taigh-òsta Port Charlotte, Ìle</li> <li>• Praban na Linnie, An t-Eilean Sgitheanach</li> <li>• Sabhal Mòr Ostaig, An t-Eilean Sgitheanach</li> <li>• Sealgar, Leòdhas</li> <li>• Ionad Turasachd Seallam, An Taobh Tuath, Na Hearadh</li> <li>• Stòras Uibhist</li> <li>• Taigh Chearsabhaigh, Uibhist a Tuath</li> </ul>	<ul style="list-style-type: none"> <li>• Mòr-ionad Cultarail Gàidhlig</li> <li>• Roinn Foillseachaidh na Gàidhlig</li> <li>• Roinn Meadhnan na Gàidhlig</li> <li>• Gàidhlig agus Uisge-beatha Albannach</li> <li>• Roinn Turasachd</li> </ul>

## 1. INTRODUCTION

In May 2013, DC Research (working in partnership with Glasgow Caledonian University, Cogent Strategies International Ltd and Pirnie Ltd) were commissioned by Highlands and Islands Enterprise (HIE) in partnership with Bòrd na Gàidhlig, Creative Scotland, Scottish Natural Heritage, The Highland Council, Argyll and Bute Council, and Comhairle nan Eilean Siar to carry out the research project: **Economic and Social Value of Gaelic as an Asset**.

### Aims and Objectives of Research

The overarching aim of this research was to **consider, evaluate and robustly evidence the current and potential use of Gaelic as an asset to the economy and society of the Highlands and Islands and Scotland as a whole**.

There were a number of **specific objectives** for the research to address – including:

- Articulating **how and where Gaelic is used** by businesses and social enterprises;
- Undertaking a **gap analysis** of where Gaelic could also potentially be used to add value;
- **Profiling** organisations using Gaelic to add value;
- Developing a suite of **indicators** to capture the size, scale and impact of Gaelic related activity;
- Identifying Gaelic related **opportunities**;
- Identifying **barriers and constraints** to growth and suggested solutions; and
- Making **recommendations** as to how investment might best be targeted to maximise the economic and social value of Gaelic.

Each of these objectives is addressed in the relevant sections of this report.

Overall, the research has attempted to assess the role of Gaelic as an economic and social asset, and the specific remit of the research is acknowledged as being a crucial first step in researching and evaluating this area of Gaelic development. As such, this research should be regarded as an **initial, baseline study** which has sought to explore and assess the current (and potential) role of Gaelic as an asset economically and socially and, where possible, to **quantify the value of Gaelic as an asset**.

The quantification of Gaelic as an asset has been part of the unique remit of this research, with the overarching aim being:

*“To consider, evaluate and robustly evidence the current and potential use and value of Gaelic as an asset to the economy and society of the Highlands and Islands and to Scotland as a whole”.*

With the original remit also emphasising that:

*“...this research is uniquely focused on quantification and future exploration of the contribution Gaelic makes to the economy and society of the Highlands and Islands region; and Scotland as a whole”.*

The issues surrounding the quantification of Gaelic as an asset are dealt with in Section 6 of this report.

It is also important to **clarify what this research has not attempted to do**. The specific remit is made clear in the following statements set out by the multi-partner Steering Group<sup>3</sup> at the outset of this research project:

*The research is not trying to capture the entire social and economic impact of Gaelic, it is seeking to illuminate the social and economic value of Gaelic where it is used as an asset and where it has the potential to be used as an asset.*

*The study quite uniquely focuses on organisations that use Gaelic as an asset to derive economic or social benefits. The research should highlight where Gaelic adds value to a transaction-social or economic, rather than where it costs the public purse. Much other research has already been undertaken to quantify public sector inputs and outcomes, which this study does not seek to replicate.*

This research has therefore not been about carrying out a full-scale economic impact assessment or cost-benefit-analysis of Gaelic on the Highlands and Islands and Scottish economy. It has focused on the remit set out and has **sought to highlight where Gaelic adds value to an economic or social transaction, primarily through the development of specific profiles and case studies** which are used in the report to illuminate the social and economic value that Gaelic provides.

## Overview of Approach and Method

A detailed explanation of the approach and method for this research is set out in Annex 1 to this report. A summary of the main tasks carried out, and the types and levels of primary research consultation implemented, is outlined below.

## Introduction

In order to fulfil the aims/remit of this study **a wide-ranging approach was adopted that included a combination of ‘top down’** (i.e. a secondary data driven model that used official Census and economic statistics) **and ‘bottom up’** (i.e. a primary research driven approach that involved substantial consultation and data collection from those using Gaelic as an asset) **elements to the method**.

The ‘bottom up’ approach was important for the identification of those that currently use (or could use) Gaelic as an asset, and also to understanding how it is used, and could further be used. It was also important for the quantification of Gaelic as an asset as this quantification needs to be fully informed by those using Gaelic as an asset.

In conjunction, **the use of existing, secondary data as a ‘top down’ approach helped focus the remit** (geographically and sectorally) of the primary research. The top down approach is founded on the use of available, official statistics. The purpose of adopting this approach was (1) that the work is transparent and able to draw strength from the quality assurance procedures of the Government Statistical Service and the United Kingdom Statistics Authority, and (2) that it should be replicable (relatively inexpensively) in the future.

<sup>3</sup>A multi-organisation Steering Group has overseen this research – information about the membership and remit is set out in Annex 2 of this report.

The various initial strands of work from the **desk research** helped to identify the geographic areas (and the related economic sectors) where people with knowledge of Gaelic (i.e. concentrations of Gaelic speakers) are located, as well as identifying specific businesses, social enterprises and community groups that could be involved in the consultations, providing an initial starting point for the focus of the primary research. This helped to inform both the approach taken to the survey development and also the locations selected for the face-to-face consultation stages – both the one-to-one interviews and the focus groups – helping to ensure that those involved in the main elements of primary research provided appropriate coverage of business/organisation type, size, activity, sector, and geography.

The primary research took the form of four main areas of activity:

- **Two wide-ranging e-surveys** of firstly, **businesses and social enterprises** and secondly, **community groups and organisations** located in the relevant localities and relevant sectors of the economy.
- **One-to-one, face-to-face consultations with a range of key stakeholders and partners.** This included consultations with representatives from the project Steering Group as well as consultations with business **sector representatives** and associations to capture national, strategic/**policy** perspectives as well **industry and sector specific** perspectives on the role and value of Gaelic.
- **One-to-one, face-to-face consultations with a sample of businesses, social enterprises and community organisations and groups** currently using, or with the potential to use, Gaelic as an asset.
- **Face-to-face, focus group consultations with a sample of businesses, social enterprises and community organisations and groups** currently using, or with the potential to use, Gaelic as an asset.

### Online Surveys

The surveys ran from August 2013 until late October/early November 2013, a longer timescale than initially planned, based on an agreement with the Steering Group to keep the surveys open for the longer timescale to allow additional responses to be submitted during the face-to-face elements of the primary research.

The original intention was for the development of the ‘master list’ of survey invitees by the research team, however, early discussions with Steering Group representatives identified that data protection issues would make the provision of information such as contact details difficult (or impossible) for a number of Steering Group organisations. As a result, it was agreed that both direct invitations to complete, and general promotion and dissemination of, the surveys would be carried out by the individual Steering Group members (with support from the research team).

In total, across both surveys, **249 replies** were received (including partial responses), 166 respondents completed the survey, and **216 responded to at least one of the key questions** in the surveys (about whether Gaelic represents an asset to their business/enterprise/organisation).

Given that the research team did not have direct information about which businesses, enterprises and community organisations received direct invitations to the survey (due to the aforementioned data protection issues) information was collected from the Steering Group which indicated that more than 2,500 direct invitations were sent out. However, there were a number of overlaps/duplications in the send outs – i.e. the same business receiving a direct invite from more than one Steering Group organisation. Therefore, the proxy measure used to assess the number of direct invites from the Steering Group related to non-overlapping geographic areas (to ensure no double counting of invites took place). Taking this approach gives a **total of 1,680 direct invitations**.

Based on this, two estimates have been taken for the total number of direct invites – an upper limit of the total sum assuming that there were no overlaps/duplications in the direct send-outs from different Steering Group members, and a lower limit where it has been assumed overlaps/duplications exist except where geography makes it clear there would be no overlap.

On this basis, the response rates for the surveys are as follows:

- The response rate in terms of those that **started** the survey is between **10% and 15%**.
- The response rate in terms of those that **completed** the survey is between **7% and 10%**.
- The response rate in terms of those that responded to the **key questions** about Gaelic as an asset is between **9% and 13%**.

In summary, the response rate to the surveys is therefore of the scale that would be expected for an online survey such as this and is comparable with equivalent studies – focusing on the key question as the best measure of response, the response rate is estimated to be in the region of between 9% and 13%<sup>4</sup>.

### Focus Groups and Interviews

The full list of invitees for the focus groups and interviews was developed through an iterative process, initially based on consultations carried out with Steering Group members, feedback on an initial list developed in early August 2013, additional suggestions received at the Steering Group meeting in August 2013, and through direct requests to Steering Group members for further suggestions. All of this contributed to a long list of potential consultees.

This long list (of more than 550 suggestions) was ‘cleaned’ and tidied – the variance in the quality and the level of detail of the information provided led to this becoming a much more detailed and time-consuming task than was initially anticipated. For example, around half of the 550 suggestions received did not provide any explanation/reason for suggestion, around half did not include a contact person for the business/enterprise/ organisation, and around half did not have contact details.

<sup>4</sup> Examination of the survey responses did not reveal any apparent biases in the surveys, although for the reasons set out above, the research team did not have sufficient information available to them to fully assess the representative of the responses. However, a breakdown of survey respondents by geography and sector is included in Annex 1, and shows the expected geographic pattern of response for this type of research.



A final list of focus group and interview invitees was developed through a combination of the following actions:

- Consultations and discussions with HIE.
- Support from individual Steering Group members in providing additional information to help 'fill in the blanks' in terms of contact names and contact details<sup>5</sup>.
- Specific advice and guidance from individual Steering Group members to help focus and narrow down the list to the correct scale.
- Finally, an assessment of survey respondents to identify any additional invitees from this source.

This use of the survey results at this stage also helped to **ensure that those selected/invited to be involved in the face-to-face consultations (one-to-one or group) represent an appropriate mix across a number of factors** including: organisation type, organisation size, sector, and geography. It also allowed the focus group and consultation invitees to include those that currently use Gaelic as an asset, and also those that do not (but could potentially) use Gaelic as an asset.

In terms of the balance between focus groups and interviews, the original intention was for 12 focus groups to be carried out in 12 different locations across Scotland, with the selection of geographic locations ensuring appropriate coverage of the relevant areas, in terms of covering key Gaelic areas/locations – both from a community perspective and economic perspective. This was thought to be a sufficient number to cover all the relevant locations whilst also allowing sufficient resources to be dedicated to one-to-one interviews with an appropriate scale and distribution of businesses, social enterprises, and community organisations.

One interesting development as this stage of the primary research progressed was that, with 12 focus groups planned, the expectation was for around 30 one-to-one consultations to be carried out. Assuming six people attended each focus group, this would result in a total of just over 100 consultees from the focus groups and interviews combined.

Whilst this total number of consultees was more than achieved (the final total was 120 including Steering Group consultees), the majority of these ended up being in the form of one-to-one interviewees rather than focus group attendees. This shift was due in part (based on anecdotal evidence from invitees) on people being happier to be consulted on a one-to-one, private/confidential, basis rather than in a group - given the issues and topics being discussed. The fact that being consulted on a one-to-one basis typically took place at the consultees' place of work, whilst attending a focus group required more time for them to dedicate, in terms of travelling to and from the focus group venue was also thought to be a contributory factor in this shift.

---

<sup>5</sup> In particular, many thanks to Comunn na Gàidhlig for their help and efforts with this.

The focus groups took place during October and November 2013 – with the eleven focus group locations being (in chronological order): Edinburgh, Skye, Inverness, North Uist, Harris, Lewis, South Uist, Oban, Glasgow, Barra, and Islay. The one-to-one interviews were primarily conducted around the focus groups when appropriate (i.e. at times and days prior to/subsequent to the focus groups taking place) with the others being carried out at other times and also via other means (e.g. by telephone as well as face-to-face) where it was more convenient for the consultee.

A full list of the individuals who were consulted on a one-to-one basis, either face-to-face or via telephone interviews, as well as those who attended the eleven focus groups are listed in Annex 2.

## Summary

In total, the primary research consulted with, or received responses from, more than 300 businesses, enterprises and organisations – around two-thirds (more than 200) from the surveys, and more than one-third (120) from the focus groups and interviews.

Reflecting on this, the research team regard this as a satisfactory scale of consultation, and believe it encapsulates an appropriate mix of consultees to provide the evidence base for this research study.

This primary research has achieved coverage of the key geographic locations, the key sectors (focusing on key sectors where previous research suggests Gaelic is used as an asset), and has covered both the economic and social dimensions of Gaelic as an asset.

As such, the evidence base developed through this primary research, in conjunction with the findings from previous research that has been reviewed, and from the ‘top down’ approach, ensures that the results and findings from this study can be regarded as robust.

However, this does not mean that the research is comprehensive, nor that it forms a census of all of those using Gaelic as an asset. The research has however achieved **good coverage**, and has been **able to construct an evidence base around Gaelic’s role as an asset, as well as develop a range of case study examples of businesses and organisations where Gaelic adds value and is used as an asset**. However, there is no doubt that there are many more examples not included/covered in this research where Gaelic is being used as an asset to add value to a transaction – social and/or economic.

As noted earlier in this section, the research has attempted to assess the role of Gaelic as an economic and social asset, and the specific remit of the research is acknowledged as being **a crucial first step in researching and evaluating this area of Gaelic development**. A key next step in furthering this area of research could be for the multi-partner Steering Group to direct efforts at addressing the gaps in the evidence base developed as part of this study to enhance the breadth and depth of the coverage – see Section 6 (Issues and Challenges with Quantifying the Value of Gaelic as an Asset) for consideration of some potential actions around this.

Additional reflections from the research team about the study approach and method are included in Annex 3 to this report.

## Report Structure

The remainder of this report is structured as follows:

- **Section 2** presents the **background and context** and looks in detail at previous research on the economic and social role of Gaelic – including assessing the current position of Gaelic, the key current policy position for Gaelic, the recognition and changing role of Gaelic and other minority languages, and the specific role of Gaelic in particular sectors.
- **Section 3** focuses on the findings from the primary research – the business/social enterprise and community group surveys, the focus groups, and the one-to-one interviews – and summarises the key results. In particular, the section focuses on two aspects: (i) the **use of Gaelic** – i.e. how and where Gaelic is used by businesses, social enterprises, community groups and organisations; (ii) the **role of Gaelic as an asset** – i.e. how important Gaelic is to the business/organisation, whether or not is an asset to the business/organisation, and the different ways in which it adds value.
- **Section 4** presents a range of **case studies** that provide **profiles and examples** of individual businesses, organisations and ‘sectors’ that use Gaelic as an asset. These summaries highlight examples where Gaelic is an asset and adds value to the business, enterprise, or organisation and include coverage of the main types of business and organisation where Gaelic is an asset, as well as the main sectors where Gaelic is recognised by businesses as adding value (or having the potential to add value).
- **Section 5** draws on the primary research findings, and reflects back on the wider issues about the **inter-relationship between Gaelic and economic and social development** – giving consideration to the role of Gaelic in supporting economic and social development and also the role of economic and social development in supporting Gaelic.
- **Section 6** focuses on the **quantification of the economic value of Gaelic as an asset**. This includes presenting the results from the primary research about the quantification of the economic value of Gaelic, as well as setting out some further reflections on the **issues relating to quantification** which have emerged during the research, and giving some **consideration to the potential** economic value of Gaelic.
- **Section 7** looks forward and considers the future **potential** for Gaelic in terms of an economic and social asset. It draws on the research findings from the previous sections, as well as additional evidence from the surveys, focus groups and interviews, and identifies both the **opportunities and the challenges** around the use of Gaelic to enhance and add value to businesses and enterprises.
- **Annex 1** explains the **approach and method** adopted for the research – setting out the various tasks that were carried out, including the various elements of primary research, and also reflects on the lessons learned from adopting this approach/method.
- **Annex 2** provides a **list of those organisations/individuals consulted** – specifically those that were involved in the one-to-one interviews and also those that attended the focus groups carried out in various locations across Scotland. It also provides information about the membership and remit of the Steering Group.

- **Annex 3** sets out some **reflections** from the research team about the study – including clarifying the remit of the research, reflecting on the approach adopted and some of the wider context issues.
- **Annex 4** contains further historical and contextual detail on Gaelic.
- **Annex 5** contains a list of the references used in this report.
- **Annex 6** provides summary matrices of the business characteristics of the groups of businesses and enterprises included in the quantitative assessment of the economic value of Gaelic.

## 2. BACKGROUND AND CONTEXT: UNDERSTANDING THE ROLE OF GAELIC

### Introduction

This section outlines the background situation of Gaelic in modern Scotland. A brief historical overview, looking at the origin and development of Gaelic through to modern times is found in Annex 4.

The themes covered in this section consist of:

- An overview of statistics and a review of Gaelic in current public opinion.
- Current policy positions towards Gaelic.
- Gaelic as a tangible and intangible good for society.
- The benefits to society of bilingualism and multilingualism.
- Different Gaelic communities... have different perspectives.
- Role of migration and demographic change.
- Changing insights into models of economic development: The perceived role of cultural diversity.
- Minority language impact in urban based media.
- Minority languages and economic development: Some comparative observations in relation to Wales, Ireland and Scotland.
- Possible paradigms in favour of extending minority language use in the economy.

*“Placing more value on, and investing in, the native language and cultural traditions of the region will result in fortifying cultural identity and sense of place, increasing confidence and self-esteem. This in turn can lead to population retention, inward migration, greater entrepreneurial activity, business creation and ultimately higher GDP. Quite simply, at Highlands and Islands Enterprise we believe that there is a direct link between levels of confidence and levels of economic activity and economic growth.*

*Our investment in Gaelic language and Gaelic arts and culture not only brings about the direct creation of employment in the Gaelic sector, jobs which are largely based in the Highlands and Islands, but represents an investment in the seedbed of the cultural and creative sector... Increased cultural vibrancy and nurturing a ‘creative cluster’ make the area more attractive as a location, helping drive economic growth. Gaelic not only plays an essential and crucial part in this, but it also helps reinforce the culture of sustainable development across the region, which is at the heart of everything we do at HIE”.*

Willie Roe, former Chairman of HIE, on strengthening the Gaelic language as a priority with the aim of enhancing the natural and cultural heritage within the Highlands and Islands of Scotland.

## A snapshot of statistics

This research study takes place at a time when the latest Census figures (2011) provide a reasonably up to date snapshot of current Gaelic use in Scotland.

According to the 2011 Census, there are 57,375 Gaelic speakers in Scotland (approximately 1.1% of the population), although in some rural areas of the Western Isles (where 52% of the population is reported as speaking Gaelic) there are townships and areas where 80% of the population speak the language. In parts of the Inner Hebrides and Lochalsh the Gaelic speaking percentage remains in double figures, while due to a long term shift towards urban areas there are now in the region of 10,000 speakers of Gaelic in the greater Glasgow area, and likewise a substantial number in the Edinburgh area (almost 6,000). Overall, according to the Census approximately 87,000 individuals were claimed to have 'some knowledge of Gaelic' in 2011.

The 2011 Census provides information on the extent of various Gaelic abilities across Scotland. The results, summarised in terms of local government boundaries, show by far that the highest concentration is in the Outer Hebrides, followed by Skye and Lochalsh, the offshore islands of Argyll and Bute, the rest of the Highlands and of Argyll and Bute, and specific areas in other authorities – notably Glasgow. Across the rest of Scotland, most Council areas have about 1,000 people with some ability in Gaelic.

Table 2.1 and Figure 2.1 illustrate the extent of Gaelic ability by geographic area. These show the locations of the strongest concentrations of Gaelic relative to the population.

An additional assessment of Gaelic ability is provided in Table 2.2 which summarises the extent of Gaelic ability – split by local authority and by type of Gaelic ability.

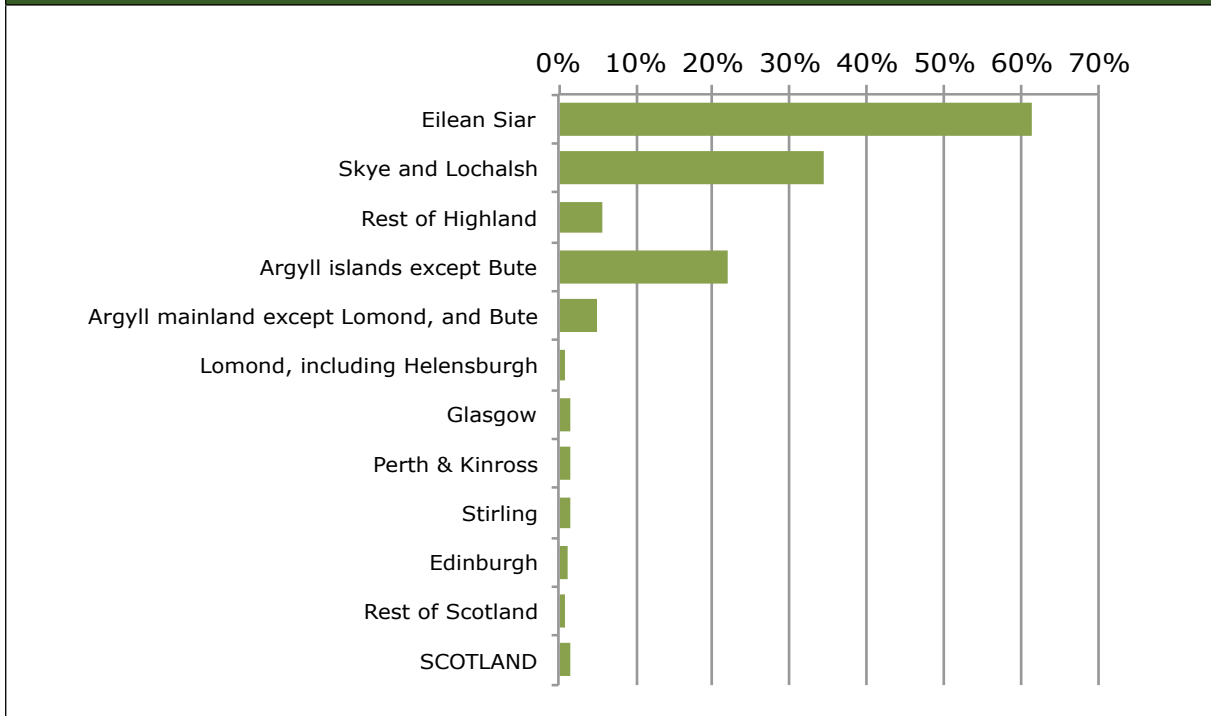
<b>Table 2.1: Extent of Gaelic Ability by Geographic Area</b>			
	<b>Population aged over 3</b>	<b>Number of population with some knowledge of Gaelic</b>	<b>Percent of population with some knowledge of Gaelic</b>
Eilean Siar	26,900	16,500	61.2%
Skye and Lochalsh	12,700	4,400	34.3%
Rest of Highland	211,900	12,200	5.8%
Argyll islands except Bute	8,800	1,900	21.8%
Argyll mainland except Lomond, & Bute	58,900	3,000	5.0%
Lomond, including Helensburgh	18,000	200	1.0%
Glasgow	572,600	9,500	1.7%
Perth & Kinross	142,300	2,200	1.5%
Stirling	87,600	1,400	1.6%
Edinburgh	460,100	5,900	1.3%
Rest of Scotland	3,518,300	30,000	0.9%
<b>SCOTLAND</b>	<b>5,118,200</b>	<b>87,100</b>	<b>1.7%</b>
<b>Source:</b> CogentSI analysis of Census 2011, National Records of Scotland			

**Table 2.2: Extent of Gaelic Ability by Local Authority and by Type of Gaelic Ability**

	Understands but does not speak, read or write Gaelic	Speaks, reads and writes Gaelic	Speaks but does not read or write Gaelic	Speaks and reads but does not write Gaelic	Reads but does not speak or write Gaelic	Other combination of skills in Gaelic	Total (Gaelic ability)	Gaelic Ability (Percent)
Scotland	23,360	32,190	18,970	6,220	4,650	1,680	87,060	1.7%
Aberdeen City	1,200	930	550	150	270	80	3,170	1.5%
Aberdeenshire	1,070	720	520	160	200	60	2,720	1.1%
Angus	300	220	150	50	80	30	830	0.7%
Argyll & Bute	1,300	1,790	1,350	320	200	100	5,050	5.9%
Clackmannanshire	180	130	120	30	40	10	510	1.0%
Dumfries & Galloway	380	230	200	40	90	30	970	0.7%
Dundee City	440	240	190	40	120	40	1,070	0.8%
East Ayrshire	300	320	230	30	60	30	960	0.8%
East Dunbartonshire	350	490	340	80	50	30	1,340	1.3%
East Lothian	250	170	180	50	60	20	730	0.8%
East Renfrewshire	250	310	190	50	60	10	870	1.0%
Edinburgh, City of	1,950	1,840	990	330	680	150	5,940	1.3%
Eilean Siar	2,150	8,170	3,890	2,000	160	120	16,490	61.2%
Falkirk	410	290	280	60	90	30	1,160	0.8%
Fife	880	660	470	140	230	80	2,460	0.7%
Glasgow City	2,740	3,480	1,860	560	670	170	9,470	1.7%
Highland	3,830	6,930	3,840	1,280	510	220	16,600	7.4%
Inverclyde	170	210	180	40	50	20	670	0.8%
Midlothian	190	170	120	20	40	20	550	0.7%
Moray	350	310	250	70	80	20	1,080	1.2%
North Ayrshire	350	360	260	70	60	30	1,130	0.8%
North Lanarkshire	640	800	430	100	120	50	2,130	0.7%
Orkney Islands	70	70	40	10	20	10	220	1.1%
Perth & Kinross	680	680	480	120	150	70	2,170	1.5%
Renfrewshire	520	490	390	80	70	40	1,590	0.9%
Scottish Borders	280	180	140	50	80	30	770	0.7%
Shetland Islands	60	50	30	20	20	10	190	0.8%
South Ayrshire	260	210	130	40	60	30	730	0.7%
South Lanarkshire	690	710	430	90	130	60	2,110	0.7%
Stirling	440	410	300	80	100	30	1,360	1.6%
West Dunbartonshire	290	280	190	50	40	20	860	1.0%
West Lothian	390	350	260	50	90	40	1,180	0.7%

**Source:** DC Research analysis of Census 2011, National Records of Scotland (Table DC2120SC – Gaelic language skills by sex by age, all people aged 3 and over)

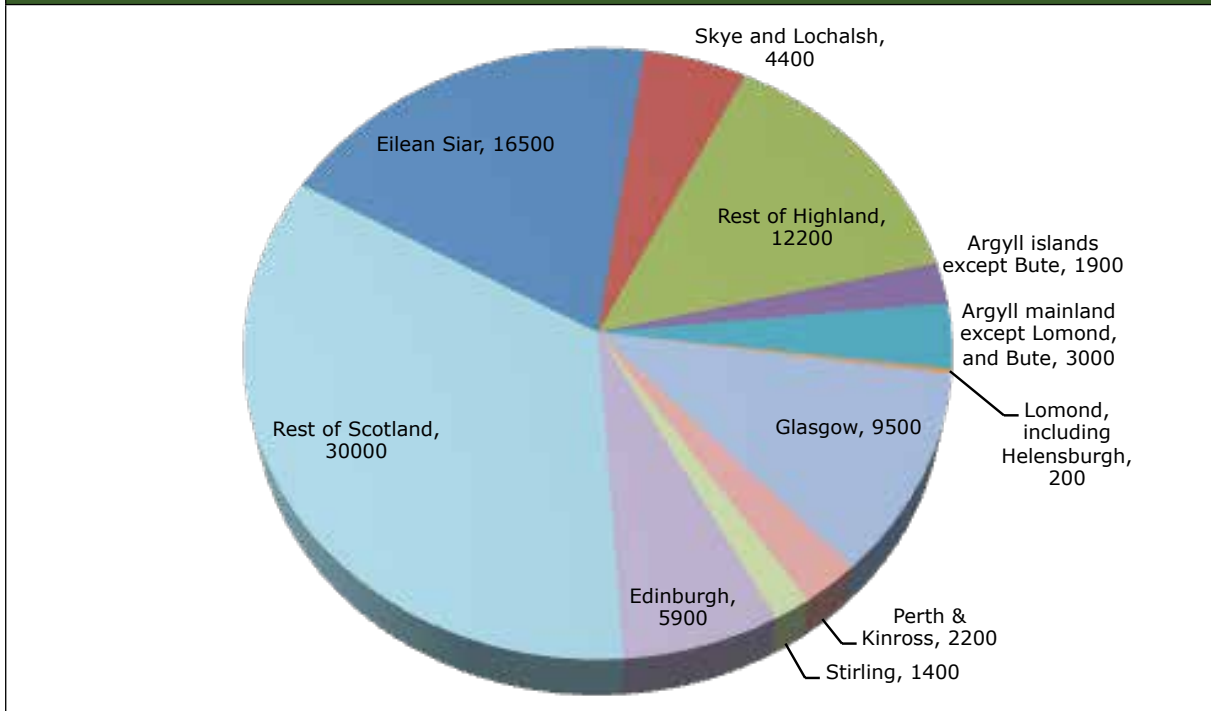
**Figure 2.1: Extent of Gaelic ability by Geographic Area**



**Source:** CogentSI analysis of Census 2011, National Records of Scotland

Figure 2.2 below shows that although the strongest concentrations of Gaelic are in the islands, the Gaelic community itself is very widely spread across the country, with one-third ('Rest of Scotland') not in any area of great concentration.

**Figure 2.2: Distribution of Gaelic ability by Local Authority Area**

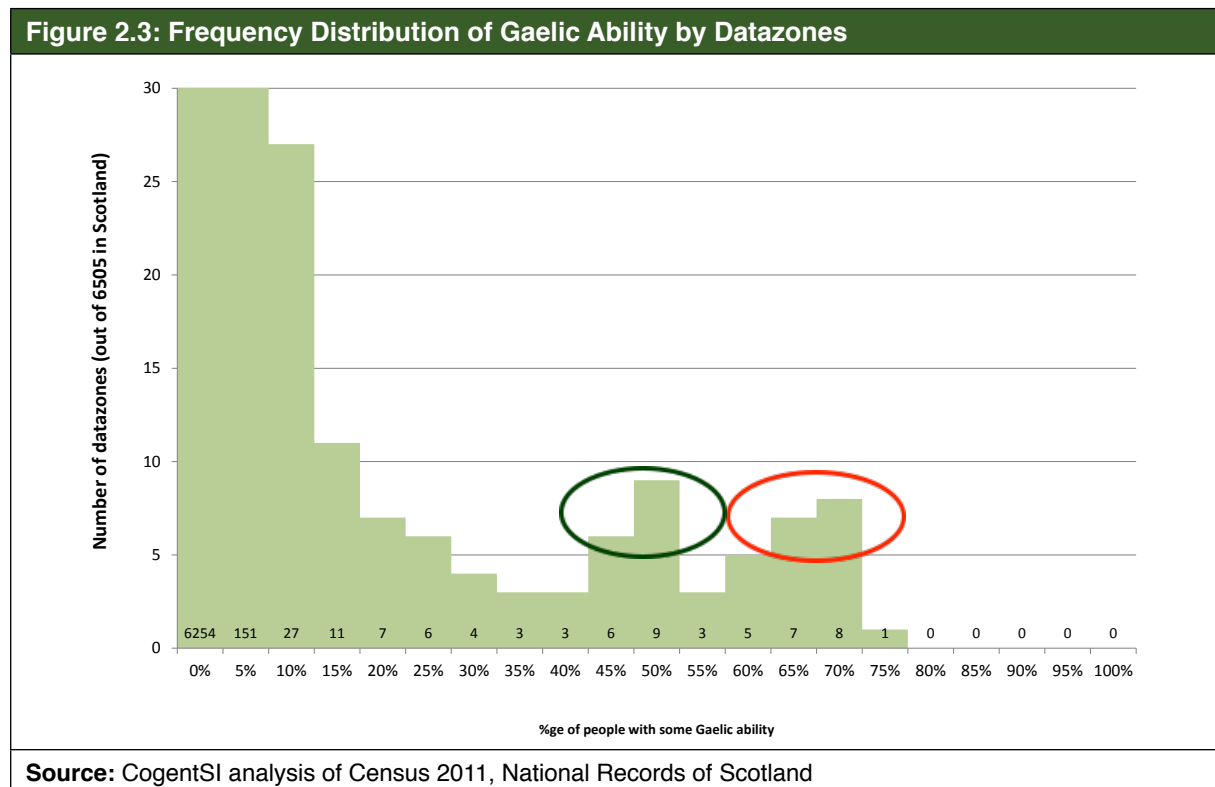


**Source:** CogentSI analysis of Census 2011, National Records of Scotland (rounded to nearest '000)



A finer geographic analysis can be achieved using datazones and this allows the analysis to be more precise about the geography of Gaelic ability<sup>6</sup>.

Figure 2.3 summarises Gaelic frequency distribution at the datazone level. It shows the number of datazones (out of a total of 6,505 for Scotland) on the vertical axis, and the level of Gaelic ability in the datazones on the horizontal axis. So, for example, there are 9 datazones where between 45% and 50% of the population have some knowledge of Gaelic, and 6,254 datazones where between 0% and 5% of the population have some knowledge of Gaelic.

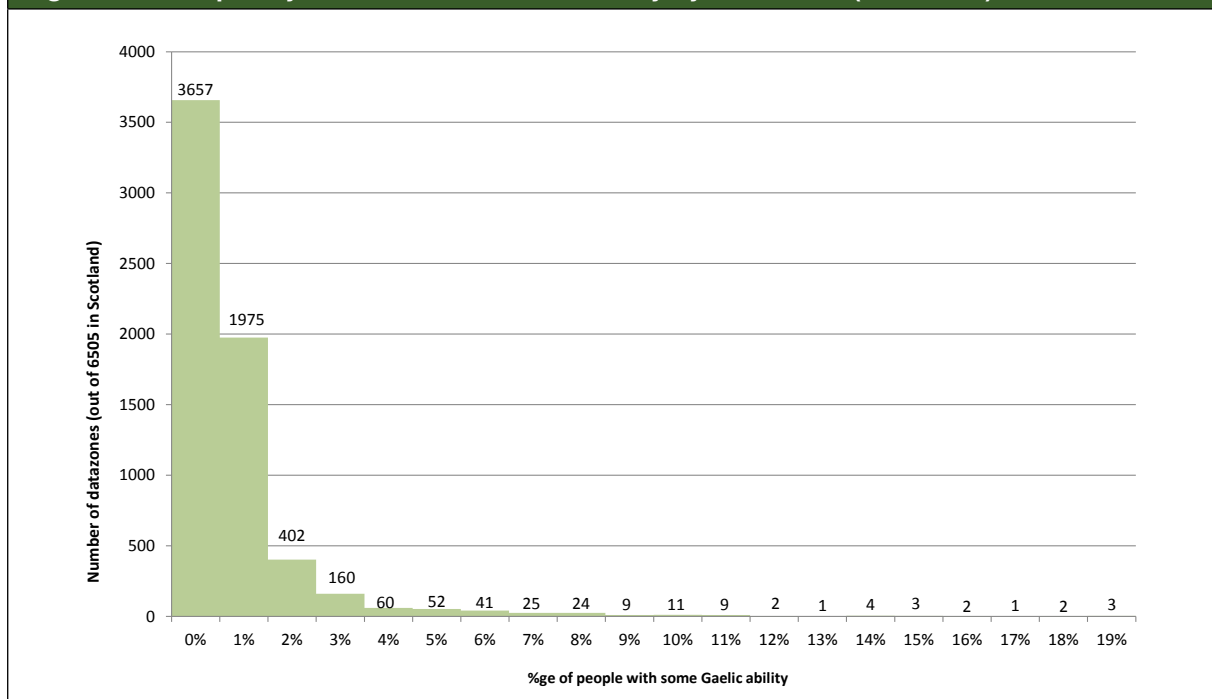


The right hand peak (identified by the red oval) in the frequency distribution shown in Figure 2.3 consists of the Outer Hebrides, and the central peak (identified by the black oval) in Figure 2.3 is primarily Skye and the Argyll Islands.

Given the vast majority of datazones are contained within the distribution shown on the left-hand side of the horizontal axis – especially between 0% and 20% on the horizontal axis, Figure 2.4 focuses on this data, to show the number of datazones within this particular range of the frequency distribution.

Figure 2.4 also shows that in the great majority of datazones fewer than 2 per cent of people have some knowledge of Gaelic.

<sup>6</sup> Datazones are composed by combining a number of neighbouring Census output areas, and originally had a population of about 800 each, although births, deaths and migration (and demolition in the cities) mean that the range is now from zero to 1100.

**Figure 2.4: Frequency Distribution of Gaelic Ability by Datazones (lower end)**

**Source:** CogentSI analysis of Census 2011, National Records of Scotland

As is shown in Annex 4, in the discussion on the historical role of Gaelic in Scotland, in many ways it may seem remarkable to some that the language has survived at all in the 21st Century given the challenges it has faced. It may be even more remarkable that it appears to be showing signs of renewal in younger age groups, through current (but very limited) provision of Gaelic Medium Education, and also through its acknowledged success within arts, culture and the media – exemplified in the activities of the growing Fèisean movement and the output of BBC ALBA amongst others.

### Scotland's current attitude to Gaelic: Gaelic in public opinion

Recent reports by the Scottish Centre for Social Research and others into public attitudes towards Gaelic in Scotland (O'Hanlon et al 2013; Paterson et al 2013; West et al 2011) have shown the current goodwill felt towards Gaelic by the majority of the Scottish people – **with 76% of people seeing the Gaelic language as an 'important part of Scottish heritage'**. This was not a reflection of their ability to speak or understand Gaelic, as well over 70% of those who answered in this way had no recollection of having exposure to Gaelic as a child (O'Hanlon et al 2013).

The same research indicated that 85% of those questioned believed that Gaelic speakers should have the right to use Gaelic in communication with their local council. 48% believed that parents throughout Scotland should have the right to send their child to a Gaelic-medium school (a right which they do not have at present). According to O'Hanlon, it may also be of interest to note that 81% of those questioned wished that there should be at least as many Gaelic speakers in Scotland in 50 years (although only 45% of respondents believed this would be the case). According to West, who undertook social research for the Scottish

Government 51% of the Scottish people were in favour of the usage of Gaelic in Scotland, with 53% supporting seeing or hearing more Gaelic used (West et al 2011). This was similar to Paterson's research, which saw 48% of those questioned 'comfortable' with the language (Paterson et al 2013).

A recent study for Bòrd na Gàidhlig into the attitude of the written press towards Gaelic also found an overall positive picture (Chalmers et al 2011). Forty two publications were examined over a 15 month period from 2009 to 2010 during **which general attitudes to Gaelic were overwhelmingly positive**, with 288 articles either positive (238 instances) or positive but critical (50 instances). Thirty nine articles were neutral, and 91 articles were either ambiguous (39) or clearly negative (52) thus positive attitudes were seen to outweigh negative reporting by a factor of over four to one.

The top six positive themes covered by the press were (in descending order): Education, Gaelic culture in general, Gaelic as a resource, Specific individuals, Art/music/poetry and Gaelic in the media (e.g. BBC ALBA etc.). The top six themes covered by the press in a positive albeit critical way were (in descending order): Education, Gaelic as a resource, Gaelic language resources, Bòrd na Gàidhlig, the cognitive benefits of bilingualism and Gaelic in the media.

## Current policy positions towards Gaelic

### The Gaelic Language Act and current Gaelic Language Plans

McLeod (2013) has noted the '*new momentum and prominence*' in efforts to sustain and revitalise Gaelic in Scotland, with Gaelic increasingly being perceived as an essential part of Scottish cultural distinctiveness. This was reflected in the passing of the Gaelic Language Act in 2005, giving official status to the language which should command 'equal respect' with the English language. Through the Act, Bòrd na Gàidhlig (established in 2003) was also given a statutory footing and empowered to prepare a National Gaelic Language Plan at least every five years. The Bòrd was also given power to require any public body to prepare a Gaelic Language Plan.

Bòrd na Gàidhlig have outlined eight key outcomes in the Gaelic Language Plan 2012-2017 in order to secure an increase in the number of people learning, speaking and using Gaelic in Scotland. These are in the fields of:

- Home and Early Years
- Education
- Post-School Education
- Communities
- Workplace
- Arts and Media
- Heritage and Tourism, and
- Gaelic corpus.

While this is a very positive and historic step that transforms official policy towards Gaelic, it should be noted that the Gaelic Language Act is considerably weaker than similar legislation in jurisdictions such as Catalunya, Canada, and Wales. For example, the National Gaelic Language Plan is not legally enforceable, and the phrase 'equal respect' has no clearly recognized meaning in law – and differs fundamentally from the Welsh Language Act 1993 that requires that Welsh and English are to be treated on '*a basis of equality*' (McLeod, 2013: p7).

Of particular note, given the remit of this research study, the Act does not address the private sector at all. According to McLeod '*the possibility of imposing Gaelic-related obligations on private companies was never seriously contemplated*'.

Nevertheless, the Act and the work of the Bòrd do allow a holistic strategy to be discussed and furthered in relation to Gaelic in Scotland. As of March 2014, 46 Gaelic Language Plans had been approved by the Bòrd, (four of which were in their second version) and were being put into practice by the authoring organisations. Thirteen public organisations in Scotland were in the process of developing Gaelic Language Plans with a further five organisations preparing a second iteration of their plan.

An assessment of the inaugural language plans by Milligan et al found that '*while many of the recommended strategies for creating opportunities for the passive use of Gaelic in a work environment had been successfully implemented, more attention to capacity and attitudes building was needed, as this would increase the uptake of such opportunities for Gaelic language use*'. (Milligan et al 2013).

Currently twenty of Scotland's thirty two councils have either published a Gaelic Language Plan, or have it in preparation. These include Glasgow, Argyll and Bute, Highland, and Comhairle nan Eilean Siar. Other public bodies with current plans – some in preparation of their second plan – include Loch Lomond and the Trossachs National Park Authority, Cairngorms National Park Authority, Scottish Natural Heritage, Skills Development Scotland, Creative Scotland and Highlands and Islands Enterprise (HIE).

HIE's Gaelic Plan 2012 - 2015 sets out the organisation's role in the development of Gaelic, and identifies **commitments that HIE will undertake to capitalise on Gaelic's contribution to the delivery of HIE's four organisational commitments:**

- Supporting businesses and social enterprises to shape and realise their growth aspirations
- Strengthening communities and fragile areas
- Developing growth sectors, particularly distinctive regional opportunities
- Creating the conditions for a competitive and low carbon region.

Few local authority Gaelic Language Plans include economic commitments within their respective plans. However, in the case of **The Highland Council, its second Gaelic Language Plan, published in 2012, contains five Themes, one of which is “What we will do for Gaelic in Economic Development”**. In addition, **Comhairle nan Eilean Siar’s Plan contains commitments that encompass economic aspects of development**. In terms of both the Highland and the Western Isles’ economy, both the Council and Comhairle support the stimulation of economic activity in communities through the Business Gateway and Community Gateway initiatives, which provide advice and financial support for businesses including cultural tourism and other businesses with a strong focus on Gaelic development.

**However, at present, the majority of local authorities treat the development of Gaelic primarily as a social asset, and have not yet developed a view of treating Gaelic as a potential tangible economic asset to be integrated into the local economy.** This approach is also common within the business community as the primary research findings presented later in this report will show (see Section 5).

### Gaelic as a tangible and intangible good for society

#### Decoding Scotland’s history

In considering the use of Gaelic as an asset, it is important not to underestimate the value of Gaelic in helping Scotland to ‘decode’ its past. In terms of understanding the topography of the landscape, both rural and urban, it has increasingly been seen as an indispensable part of understanding our surroundings. Thus light can be shone on the original significance of localities ranging from Scotland’s nuclear weapons storage at Coulport (*An Cùl-Phort* ‘the rear harbour’); Glasgow’s main prison Barlinnie (*Blairlenny* = *Blàr* ‘plain’ plus *lèanach* ‘swampy’); towns and cities, whose Gaelic name also tells a story – East Kilbride (*Cille Bhrìghde an Ear* ‘Church of St Bridget’ (East)); Dundee (*Dùn Dè* ‘Tay Fort’); or venues in the Highlands such as Benderloch (*Beinn Eadar dha Loch* ‘the mountain between two lochs’) or even the unforgettably picturesque *Loch Beag Gil Speireig* ‘the lesser loch of the ravine of the hawk’, in Achmore Lewis. As Roddy MacLean has declared in his short work (MacLean 2010) *‘It’s time to call a spade a spade’* and acknowledge the benefit of a higher understanding of our Gaelic heritage in Scotland.

A greater knowledge of Gaelic can clearly shed light on our surroundings, and is one of the benefits of bilingual road signage (which is supported by almost half (49%) of respondents in the public attitudes survey mentioned earlier in this section (O’Hanlon et al 2013), with 44% of respondents supporting bilingualism in public signage across Scotland).

#### Bilingual signage

Considering bilingual signage in general, Comunn na Gàidhlig has reported a significant increase in the take up of the support scheme it delivers on behalf of HIE for this over the last three years, and 150 projects have taken advantage of it over the last seven years, with ‘third sector’ organisations being those requesting help in the greatest part, followed by those in hospitality and tourism.

The Outer Hebrides, Argyll and the islands and Lochaber collectively account for more than half of all projects in this period (Reference Consultants 2011). According to Reference Consultants, the **motivations for investing in signs/marketing materials that included Gaelic were varied**, with the **main one being a desire to support the language**, followed by the possibility or offering a more distinctive Gaelic profile, and also by the availability of funding. Very few, however, referred directly to seeking to increase their number of customers or users.

In relation to more detailed interpretive signage (such as found at museums etc.) a more recent research report (Centre for Interpretation Studies 2013) has indicated some of the complexities involved in achieving a outcome in interpretive signage that is felt to be suitable by fluent Gaelic speakers, Gaelic learners and those who only have English, indicating the need for a professional approach at all times, which may involve a cost outlay.

As will be shown later in this report (Section 3 – Types of Benefits Gaelic Provides to Business), the primary research carried out for this study found that many consultees see Gaelic signage as a concrete way of showing appreciation of the relevance of the language within communities throughout Scotland, however only a minority see it as a direct economic asset at present.

## The benefits to society of bilingualism and multilingualism

### Bilingualism in the European Union and Scotland

Recently, several commentators have again stressed the cognitive benefits, for children in particular, of a bilingual or multilingual education. From a European Union study on multilingualism and covering thirteen countries, Van de Craen et al (2013) outlined research that suggests learning a second language in a bilingual environment not only strengthens a child's performance in their mother tongue, it also improves analytical skills and cognitive capabilities in general. This complements similar conclusions from earlier writers such as Johnston (1994) who considered Gaelic in this regard and more recently Baker (2007).

Recent work in Scotland has also highlighted the general cognitive advantages achieved by children in other domains (Sorace 2009), while the work of O'Hanlon et al (2011) has outlined how pupils in Gaelic-medium education, who are not exposed to English in the classroom until at least Primary 3, catch up and overtake English medium pupils in their command of English. Many of the individuals consulted in the course of this current research study, also pointed out the positive general effect that Gaelic Medium Education was having socially in Gaelic communities, and in terms of the possibilities it offered to those undertaking it – economically and socially.

### Different Gaelic communities... have different perspectives

#### The rise of the 'New Gaels' outside the traditional Gàidhealtachd

Although some studies of the Scottish Gaelic world have tended to treat it as rather undifferentiated, this is increasingly not the case. Commentators such as MacDonald (1997), McEwan-Fujita (2010), Oliver (2011) and Rothach (2006) have produced several studies of the differing perceived needs of Gaelic communities – both traditional communities,

and communities of what are increasingly known as the 'New Gaels' (i.e. those who have not come to Gaelic from living in the traditional Gàidhealtachd, but have perhaps learned the language as an adult or who have been brought up in a Gaelic family or Gaelic community in an urban area such as Glasgow). This research on different views of the contexts (or domains) in which Gaelic is traditionally used, and how or whether this might be changing (for better or worse), is of relevance to this research.

Acknowledging how Gaelic has traditionally been seen as the language of the 'home, family, and crofting' with a very local focus, suitable for 'kin and neighbours' these commentators now caution against the adoption of any such simplistic view today. However, they do acknowledge the continuing prevalence of the 'courtesy rule' where in bilingual encounters, English is spoken to strangers and Gaelic to locals, – something which may continue to limit the spheres (or domains) in which Gaelic speakers see the use of Gaelic as 'normalised'.

The findings from the primary research for this study (see the later sections of this report) however confirmed this still exists as a view within a minority of Gaelic speakers in the world of work, who did not see the relevance of using Gaelic wider than in (what they perceived as) traditional domains.

### **Modern domains of Gaelic use**

Wells (2011, 2013) has recently studied the interactions between learners and native Gaelic speakers in the bilingual community of South Uist, considering the domains in which Gaelic would normally be used, with whom, and why. He has also considered Gaelic Digital Literacy and the willingness of native speakers and learners to use on-line technology, and in doing so has given some indications of the ease or difficulty of using Gaelic in areas that have tended to be restricted to English language domination (such as has been the case for business). Some considerations about how the views on the interaction between culture/ language and business has changed over time are set out later in this section in the discussions on economic development.

### **Role of migration and demographic change**

#### **Gaels within non Gaelic-speaking communities**

The most recent of the long line of research undertaken by Professor Kenneth MacKinnon investigates current demographic change in what he calls 'The Gaelic Language Group' (2010). In this research he considers the current figures regarding the density of Gaelic speakers in different geographical areas. With a focus on the important percentage of 70.7 – which gives a 50% chance of locals meeting and speaking together in Gaelic – he indicates that this has declined to a situation where almost two thirds of Gaelic speakers now live within essentially non Gaelic-speaking communities, and for whom their only everyday Gaelic contacts are within the family or from the Gaelic media. The importance for this research is whether this implies that Gaelic speakers may now be more open to the spread of Gaelic into non-traditional fields rather than seeing it bounded by the limits of 'kin and neighbours' as mentioned above.

Examining the mobility of Gaelic speakers compared to non-Gaelic-speaking Scots, MacKinnon indicates that by the turn of the millennium the proportion of Gaelic speakers moving home was 11.1% per annum, just below the Scottish average of 11.6%. He points out that, linked to the implications of Gaels moving into non Gaelic-speaking areas and non-Gaelic-speakers moving into traditionally Gaelic-speaking areas, one result of this increasing ease of migration is that over a decade the cumulative figures add up to more than the equivalent of the total count of all Gaelic speakers in Scotland. He concludes by saying that *'Modern Scotland and its Gàidhealtachd are no longer the settled, static world of past generations'*. This echoes the views of other researchers dealing with similar changes in minority language communities such as leading Irish researcher Dónall Ó Riagáin who in the same manner argues in relation to Ireland that it is time to 'revisit' the 'concept of the Gaeltacht' (Ó Riagáin 2011).

## Changing insights into models of economic development: The perceived role of cultural diversity

### Early views of Gaelic development – Thirty years of progress

It was more than 30 years ago that the first modern assessment of the state of Gaelic was encapsulated in the **Cor na Gàidhlig report** in 1982 (MacKay, 1982) instigated by the Highlands and Islands Development Board. This resulted in the formation of the then main Gaelic development agency – Comunn na Gàidhlig (CnaG) – which had, as one of its main remits, *'working at the interface between the linguistic and the social, cultural and economic aspects of development'* (MacKay, 1982, p.6). Amongst the proposals put forward in the report were:

*"Exploiting the potential for Gaelic tourism; studying the future implications of video and audio visual technologies for the health of the Gaelic communities; investigation of the market for Gaelic arts and culturally related objects; development of an annual festival in addition to the existing 'National Mòd'; and close attention to the growing local festival (Fèisean) movement"* (MacKay, 1982, pp89-100).

Although Gaelic language, arts and culture (GLAC) was not yet appreciated as a possible motor for development the report also recommended that:

*"Cultural and linguistic dimensions should be considered along with social and economic factors in any realistic holistic view of community and regional development, and that accordingly the HIE should examine its development policies with a view to allowing these dimensions to feature in the consideration of development policies"* (MacKay, 1982, pp89-100).

### The dynamics of Gaelic development as seen by enterprise companies

It was ten years later, however, in 1993 that the first research began to take place into the practicalities of measuring Gaelic's wider impact into Scottish economy and society. Following the publication of Cor na Gàidhlig, 1993 saw a report on **The Dynamics of Gaelic Development** for HIE, where a call was made to 'consolidate and increase



the provision of Gaelic television' (which had recently received its major boost in Gaelic-related funding), and for the development of 'Gaelic tourism' – closely integrated with recent developments in Gaelic arts and broadcasting (Pedersen, 1993). Where necessary, this would entail *'effective training to be provided in a variety of areas from the acquisition of Gaelic, to skills appropriate to the emerging Gaelic industries'*.

### **The recognition of the role of arts and culture**

The report also called for *'strategic co-ordination through institutional support'* and for *'an early review of how best to focus, co-ordinate and resource the management of Gaelic development to achieve maximum effectiveness'* (Pedersen, 1993). The strategy subsequently adopted by HIE had as its stated aim *'The development of the Gaelic language and culture as a means of raising self-confidence and stimulating economic and social development'* (Lingard, Pedersen et al., 1993). Specifically, provision was to be made for:

*"[t]he Gaelic Arts as a means of reinforcing the creation of a new Gaelic broadcasting industry; Gaelic development including training and business growth; and the integration of Gaelic into the tourist industry"* (Pedersen, 1993).

In this period, Comunn na Gàidhlig adopted, as two of its priority areas, cultural development and economic development (together with Gaelic education and promotion). Within this, the development of Proiseact nan Ealan (The Gaelic Arts Agency) and the Fèisean were highlighted, with the acknowledgment that *"cultural expression is...an important driving force for economic development"* (Pedersen, 1995). Again the development of Gaelic tourism was highlighted, with note being taken of the need to address both 'internal Gaelic tourism' – aimed at those already speaking Gaelic, and a 'volume market' comprised of visitors from outside the Highlands and Islands area, attracted by a hoped-for growing interest in all things Gaelic and Celtic. With regard to Gaelic tourism, it was envisioned that this would be private-sector-led, but supported by funding partnerships involving the HIE and Scottish Enterprise networks and others.

The background to this focus on economic development was an increasing appreciation of the opportunities afforded by the expanded Gaelic television coverage now coming online (Sproull and Ashcroft, 1993).

### **The concept of a 'Gaelic industry' and its impacts on local society and economy**

The early 1990s had seen the appearance of a seminal work by Sproull and Ashcroft (1993) which aimed to quantify for the first time the economic impact of what they categorised as the 'Gaelic industry' – all Gaelic-related economic activities, or *'all those activities (and jobs) whose principal purpose is the provision of Gaelic related goods and services, including the Gaelic culture and language'*. This was estimated (with relevant multipliers) to be the addition of £41m (at 1992 prices) to the output of the economy and the creation of almost 1,000 full-time equivalent jobs (FTEs) within the Gaelic economy. The latter was defined as *"the spatial area which stands to gain measurable economic benefits from enhancing the status of the language"*.

Further research by Sproull and Chalmers (Sproull and Chalmers, 1998; Chalmers, 2003) investigated the particular contribution of the artistic and cultural sub-sector of the ‘Gaelic economy’ in terms of jobs and other economically significant impacts. In terms of jobs, Chalmers suggested that this activity created between 215 and 230 FTEs, and perhaps more importantly set in motion a whole range of dynamics in the local economy – an area previously suggested for further research by Sproull.

Sproull had suggested that a set of dynamic effects might arise from the enhanced status of the language which could impact on social cohesion, on cultural expression, on artistic/musical output and on individual and community self-confidence.

If these links existed then the enhanced status of the language might stimulate future enterprise, raise the quality of arts and entertainment, open up opportunities for cultural tourism, reduce out-migration, stimulate in-migration and alter the skills/income profile of local economies – acting as an economic and social asset within the areas where Gaelic activity was still obvious, and giving an indication to the potential of adopting such approaches elsewhere.

Although these links might intuitively be suggested, Sproull had proposed that *“any argument that Gaelic language development can positively influence the long term health of the area defined as the “Gaelic economy” had to demonstrate that language development had an impact on one or more of a series of intermediate variables which were, in turn linked to economic growth”* (Sproull, 1993 p.34). These ‘variables’, he suggested, included *“the decision by residents to migrate or stay in the area, the decision to return or not by those who have left the area for education, training or for other reasons; the decision by local residents or incomers to start businesses in the area; the decision by tourists to visit the area; and the decision by companies external to the area to locate there”*. Although this argument is in fact closely linked to the concept of Gaelic acting as an asset, this early piece of work only raised this possibility, leaving it for further research to investigate.

It was argued that lying behind the decisions identified were a number of key propositions relating to cultural identification, distinctiveness and self-confidence. In short, it was suggested that in Gaelic Scotland **dynamic language–economy linkages appeared to operate through intermediate variables such as an individual’s sense of identity with place** (influencing migration and business start-up decisions) **and their sense of self-confidence and pride in their own Gaelic identity** (influencing business activity and tourism via the strength of the distinctive cultural ‘products’ tourists experience when visiting). It is these intermediate variables that appeared to be significantly influenced by artistic and cultural activities and thus demonstrated the use of Gaelic as a social as well as economic asset.

Acknowledgement of the Irish formula of ‘no jobs, no people; no people, no Gaeltacht’ (Williams, 1988) had seemed to clearly suggest that a positive synergy could be forged between the two voices of economic development and language development – both long-term concerns within the area of the ‘Gaelic economy’. However, the work undertaken by Sproull, Chalmers and others suggested that the argument for the language–economy link was actually much more complex than a simple one of direct jobs impact. Behind the approach was the belief that *“culture could play a critical role in human development through its effect on identity and confidence, and even its job creation aspects and marketability”* (Chalmers, 2003, p.23). **This idea – that culture and language has a basic connection with economic and social potential and opportunities – and in effect was acting as**

**an asset – in fact became an important approach in this period.** Within the debate on Gaelic language development it had become an area of further research, but as indicated below, also of some disagreement.

### **First evidence of Gaelic as an economic and social asset**

Research by Chalmers (2003) did indeed seem to justify the positive linkage suggested by Sproull's initial work, with a major study and survey (comprised of very detailed responses from six per cent of the population of the 'Gaelic economy' – over 2,000 responses) suggesting agreement between the practitioners/suppliers of Gaelic arts and culture, the business community and a representative cross-section of the community within the 'Gaelic economy' that the posited indirect impacts were of some significance.

Indeed it appeared to be the case that exposure to ('consumption of') Gaelic language, arts and culturally related goods had an increasingly positive effect on a whole range of the crucial variables under study – **perhaps the first evidence-based research that the presence of Gaelic could indeed be counted as an asset** socially and economically – although as the research made clear, a key weakness was the lack of any holistic approach to development, even within the different bodies charged with different aspects of the Gaelic situation.

The key implications of Chalmers's research were of a discernible increase in the perceived importance of GLAC (Gaelic language, arts and culture)-related activity as the involvement with such activity increased. A cross-section of businesses (both Gaelic and non-Gaelic) similarly viewed the effects of GLAC involvement in a positive light, with the community's perception of the impact of GLAC exposure/consumption on crucial developmental variables also appearing to be positive (see Chalmers, 2003). Given the comprehensive and apparently representative nature of the responses, this appeared to strengthen the case for a positive synergy.

### **More recent studies of the impact of Gaelic as an asset**

Subsequently Chalmers and Sproull (2006) published a ten year longitudinal follow up to their previous study which seemed to confirm a very solid continuation of the positive connections between involvement in Gaelic language, arts and culture, and a positive appreciation of this as an asset in a wide range of economic and social areas.

Other reports sought to continue the investigation of the social and economic impact of aspects of Gaelic arts and culture – such as the Fèisean. A report for HIE by Westbrook et al (2010) had discovered that the impacts of the 47 Fèisean studied included expenditure of over £1 million – almost all in the Highland and Islands, and with over £350,000 in the designated 'fragile' areas, with associated employment of 48 FTEs in the Highlands and Islands, including 13 in the 'fragile' areas. Participation in 2008 (the year of the study) had been in the region of almost 5,400 young people, with a whole series of longer-term impacts such as a Cèilidh trail, Youth Music Initiative and Drama outputs also acknowledged.

As mentioned previously, the growth in prominence of Gaelic signage, led in 2011 to an evaluation of the bilingual signs and marketing scheme run by CnaG on behalf of HIE, by Reference Economic Consultants. This concluded inter alia that *“for many organisations the use of Gaelic in signage and marketing materials was not directly intended to increase their custom. In many cases no such change was reported”*. It also suggested that CnaG should consider more focused targeting aiming to increase impacts, including increasing potential business benefits, but could not as yet, offer evidence as to which approach by CnaG might be the most successful (Reference 2011).

### **Demand for Gaelic Goods and Services**

The last major study by Chalmers and Sproull (2006) on the demand for Gaelic Arts (interpreted in the widest sense) examined changes over a ten year period in the factors that promoted, or in some cases constrained, the wish of consumers to purchase Gaelic artistic goods and services (or in the case of events, to take part in them).

Examining eight categories of artistic production such as Cèilidhs/Dances, traditional dance, music, concerts etc., Chalmers and Sproull (2006) found that **by far the greatest constraint on involvement or purchase was lack of availability**. Local availability of the goods/events was the highest ranked factor behind an individual’s decision, followed by the individual’s personal commitment or interest, and thirdly whether the good or event had a sense of local relevance or connection. Interestingly the factor of price tended to be ranked fourth or fifth in importance (although it was recognised that for a section of the community at the lower income scale, this was more important). Factors underpinning viewing Gaelic television or listening to Gaelic radio were also assessed. For television, availability (i.e. scheduling) was by far the highest factor constraining viewing for more than half the respondents, followed by the level of Gaelic competence for a quarter of those potentially viewing the service. For radio, understandably the level of competence was the most important factor, followed then by scheduling of the programmes.

Although Chalmers and Sproull’s comprehensive survey primarily dealt with the arts, it would **suggest a significant level of untapped demand for Gaelic goods and services** in general, constrained more by availability rather than factors such as consumers’ Gaelic fluency. This suggests that a target market, particularly for artistic goods, but not limited to that market, should not be seen as restricted to those who consider themselves as Gaelic speakers.

The recent viewing figures for BBC ALBA would also tend to back up this general conclusion, and – linked to the increasing goodwill, mentioned earlier in this section, offered by the general population (whether from Gaelic speakers or not) towards the language and culture – **suggests that sectors such as Gaelic arts, music, heritage and indeed tourism are areas for increasing possibilities, and of increasing potential**, given the growing prominence of the language in the wake of Gaelic Language Plans, Gaelic Medium Education, Gaelic media, and other initiatives.

### **Acknowledgement of the dangers of tokenism**

Although this evidence had been gathering throughout that period, there were also valid questions raised regarding **exactly what significance should be accorded to the use of Gaelic in relation to economic activity – and whether Gaelic was indeed a tangible asset – or could be seen as a tokenistic marketing exercise** (questions which continue to the present and which this current research study seeks to throw some light upon).

Perhaps the most representative examples of the range of these critical voices may be illustrated in the work of Caimbeul, MacLeod, and Lang (Caimbeul, 2000; McLeod, 2001a, 2001b, 2002; Lang, 2004), who raised concerns regarding several aspects of the envisaged linkage.

While acknowledging the aforementioned Irish formula *'no jobs, no people; no people, no Gaeltacht'*, McLeod understandably criticised any tendency to see economic development as a substitute for a robust language policy, and pointed out the possible negative effects of increased jobs leading to a relative decrease in Gaelic speakers and the lessening of intergenerational transmission of the language – increase of the latter (intergenerational transmission) being seen by Fishman as key to language regeneration (Fishman, 1990). In this McLeod echoed cautions raised years earlier by Keane and Griffith and MacKinnon amongst others, who drew attention to the *'uneasy relationship between culture and economic development'* (MacKinnon, 1992, 1997; Keane, Griffith et al., 1993). Although a well-known study by Prattis (1983) instanced the case of increased oil fabrication in Lewis as bringing about a return of Gaelic speakers, the lack of similar, well-known studies might suggest that this important example was the exception rather than the rule.

In addition, McLeod felt that the most fundamental problem with what he refers to as the *'rhetoric of the Gaelic economy'* was that it **creates the expectation of direct pay-offs in the form of employment opportunities**, and he believes it is judged primarily on this and only secondarily on the expected linguistic impact.

This is given a sympathetic appraisal by Caimbeul (2000), who fears that what was once a family culture may soon become only *'a career option or a marketing tool'*. Essentially McLeod and others are suggesting that **unless economic development programmes and strategies are designed with an explicit language-planning component, there is a real risk of undermining the language community traditionally marginalised from economic activity** – in this case the Gaelic-speaking community.

In support of this approach McLeod noted that even in areas of currently high minority language use – such as the Western Isles and Skye and Lochalsh (which might lead one to expect a higher acknowledgement of the positive attributes of bilingualism, or of the minority language) – complacency was often found in relation to employment policy and there appeared to be little awareness of any impact on minority language use through diglossia (language transfer to the majority language – English).

Evidence for this was set out in McLeod's analysis of job advertisements over an 18-month period in the Western Isles and Isle of Skye. Here, local authorities (a main employer) were found to be poor in terms of any acknowledgement of language dimensions to employment.

- In the Western Isles, of 257 jobs advertised, less than 5 per cent were advertised as *'Gaelic essential'* (2.5 per cent) or *'Gaelic desirable'* (2.3 per cent).
- Similarly, in the Isle of Skye, only 13 per cent of local authority jobs were so designated.
- Of community and economic development jobs (49), none were designated as *'Gaelic essential'*, with 30 per cent designated as *'Gaelic desirable'*.

It was found that references to Gaelic were almost completely excluded from the health, social service and voluntary sectors despite the high Gaelic-speaking profile of those needing such services. Finally, Gaelic was almost completely excluded from the private, for-profit, commercial sector (McLeod, 2001b).

This indicated a complexity that those involved in the fields of language development and the economy had to constantly be aware of. As further research was to show however, this acknowledgement of complexity is now more widespread – which is the background context to this current research regarding what may be meant of Gaelic as an asset, and how the social and economic elements interact.

With the increased recognition of the need for a holistic view of economic and social development where existing diversity exists – such as that offered by a vibrant minority language and culture – the last ten years have seen a series of research outputs seeking to fill in gaps in current knowledge as to the effect of present policy.

Within this literature, the continued tension between the ‘authentic use’ of Gaelic and its possible ‘tokenistic’ use – was again raised by Lang and McLeod (2005) who considered the packaging of CDs of predominantly Gaelic song, finding the predominance of English to be a problem for language regeneration and planning.

### **The issue of skills and filling the need for Gaelic speakers**

A major two part study into the Gaelic Labour Market (Hecla et al 2008) sought to identify the current and future Scottish labour market trends and implications for Gaelic language based employment within this market place, together with identifying practical measures to increase the demand for Gaelic skills in various sectors. It was hoped, through doing this, to be able to work towards creating a baseline about the manner in which Gaelic could be an asset for the individual in the workplace, and also to see how employers saw this as a potential asset for their own development.

Amongst the findings of this study were that the use of Gaelic across different domains remained at a low point. Responses from a survey of organisations identified some 695 employment posts designated as Gaelic essential of which 595 (86%) were full-time positions. Overall, **the survey identified 1,134 posts designated as Gaelic essential and Gaelic desirable across Scotland as a whole** with the main message being that there was emerging demand for Gaelic essential posts across a number of economic sectors providing a wider range of opportunities for people looking to enter this particular section of the Scottish labour market. **People employed in Gaelic essential posts were found to be highly qualified** with some 68% of people identified by the survey with Level 4 and above qualifications. This compared with 19.5% for Scotland as a whole.

A subsequent follow up to the Hecla report by Reference Economic Consultants (August 2012) found an increase in Gaelic Essential jobs in Scotland – up to 621 from the previously reported 595, and in the media up to 153 from 110 in 2008<sup>7</sup>.

<sup>7</sup> It should be noted however, that the first Hecla report appeared just before the financial crash and the subsequent retrenchment that this has caused within communities and local authorities. An element of caution should therefore be expressed in extrapolating any direct trends from the pre-crash period to the present.

These findings clearly signalled that **employment based around Gaelic language competency could be a career choice for individuals**, with opportunities available for career progression similar to other occupational categories across Scottish industry. The Hecla report (2008) also suggested that there was the **need to include the private sector in the future development of the Gaelic language** and concluded that **perhaps this was where the greatest challenge existed**, which if overcome, would undoubtedly reap huge rewards for the language and for Gaelic culture in general. Given that the Hecla report found there was a *“lack of detailed knowledge of the available skill sets within the potential Gaelic labour pool, which makes it difficult for employers to plan some elements of their operations other than on a short-term basis”* it suggested the need to professionalise the structure of the Gaelic labour supply chain in order to meet increasing levels of demand for Gaelic goods and services.

MacLeod, who had been a contributor to the Hecla report, also looked at the implications for individuals with Gaelic, in her PhD (unpublished 2009) and in a 2009 article, where she points out the **continuing implicit tension between the dual objectives of economic development and minority language maintenance**, thus bringing attention to the fragile nature that still exists in terms of Gaelic serving as an individual asset (2009 p.134).

### Minority language impact in urban based media and culture

#### The particular impact of Gaelic in the media and urban arts and culture

Leadbeater and Oakley (1999, 14–16) have demonstrated 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 critical role in reviving large cities that have suffered economic decline and dislocation over the past two decades”.*

A study of the impacts of Gaelic Arts and Culture in the urban area of Glasgow was carried out by Chalmers and Danson in 2009. This research suggested that it would be possible to ascribe the **aggregate impacts of Gaelic Arts and Cultural Activities (including the media) on the Glasgow economy as being in the region of £3.55 million to £4 million which supported almost 200 workers in professional and associated employment**. Chalmers and Danson (2009) also found that approximately **113 full time equivalent posts existed in Glasgow where the ability to speak, read and write Gaelic was essential** – almost all were well paid jobs requiring high levels of skill and professional abilities.

#### Gaelic at Celtic Connections

Chalmers and Danson study found that as well as Gaelic media having become a key part of Glasgow’s media community, a far greater proportion of Celtic Connections success than had previously been suggested should be ascribed to events with a Gaelic connection; the minimum ticket sales which could be ascribed to 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 also emerged – with the attendance amounting to 15,359 (which was approximately 12.7% – or one-eighth – of the attendances at all events in Celtic Connections).

Chalmers and Danson also suggested however that some areas within Gaelic arts and culture were under-utilised and that there was a need to look in particular at the under-developed marketing and image of Gaelic so that its important social and cultural impacts could be developed to the economic benefit of the city. Recent, more prominent marketing of events such as Ceòl 's Craic, Film 's Craic, the activities of the Gaelic Book Council, and the closer integration of Gaelic into events such as Glasgow's 'Aye Write' Festival and Glasgow Film Festival, would suggest that this is now being addressed.

### **Minority languages and economic development: Some comparative observations in relation to Wales, Ireland and Scotland**

Specifically referring to the three minority languages, Gaelic, Welsh and Irish in the British Isles, Professor Colin Williams, of the School of Welsh, University of Cardiff has pointed out that *“the hegemonic position of English as the default language of interaction in the UK offers a formidable barrier to the introduction of an alternative language of work and interaction such as Gaelic, Irish or Welsh”* (Williams, 2011, p.295). Referring similarly to Gaelic, Dr Wilson McLeod of the University of Edinburgh has also noted the *“longstanding perception that Gaelic has no practical economic value and that the world of employment requires the adoption and use of English”* (McLeod 2002).

Of the three indigenous minority languages in the UK, Gaelic has the least speakers numerically and in terms of percentages and is therefore, arguably, the weakest placed to counter the effect of English language dominance in the world of business. There are commonalities however within the other minority language communities in Wales and Ireland, in terms of the issue of jobs being paramount in order for a community to survive at all – irrespective of language – something that may militate against preservation of the minority language without careful planning.

#### **The situation in Wales**

Although Welsh is the strongest with 19% of the population speaking the language in 2011 (down 2 percent since 2001), again this dilemma has been succinctly stated as: *“Gwaith, tai, iaith – or in Gaelic obair, taighean, cànan – without work and homes there will not be a language”* (James, 2011, p125).

Despite the comparatively high percentage of Welsh speakers, similar to the case in other minority language communities, evidence suggests there is still low take up of Welsh language opportunities where they exist. According to Ioan, (2011, p113) in the Public Services, where more Welsh language services are offered than is the case in the private sector, there is still a problem. In relation to Dŵr Cymru Welsh Water, only 9% of customers use the Welsh language service; for BT, only 250 calls are made per day to Welsh directory enquiries; for British Gas, only 1% of Welsh customers use the Welsh language service. Attributing this to the historical preponderance of English in this area, Ioan adds that this is not surprising – *“600 years of ‘don’t even think about it!’ leaves its mark. The Welsh don’t do officialdom, not in Welsh, at least”*.



This problem exists despite the preponderance of Welsh in many day-to-day activities in Welsh speaking communities. Referring to his own home village of Caethro (near Caernarfon), James (2011) outlines the continuing strength of the language: *“All the services in the village are Welsh in language: the garage, the shop (the post office has long been closed), the public house, the holiday camp, the chapel (church) and the community hall. Most of the other activities are in Welsh: the garden and household produce show, the carnival, the community carol-singing, the children’s Christmas party (as well as Father Christmas), the children’s Easter egg hunt, the women’s club, the pensioners’ club, the children’s judo club, the pub darts team, the pool, junior football and rugby teams, as well as concerts”*. He also adds that *“The gardening club, art course, and belly-dancing sessions are held mainly in English”* (James, 2011, p126).

Despite this positive acknowledgement, and in considering the same issues raised by MacKinnon in referring to the changing nature of the Gàidhealtachd (and Ó Riagan to the Gaeltacht), Williams (2011) also points out linguistic changes in Wales, indicating that while in the 1961 Census there were 279 out of 993 communities in Wales where at least 80 percent of the population could speak Welsh, by the 1991 Census only 32 of those communities remained. He suggests that ‘instead of talking of a Welsh speaking community, it is more appropriate to talk of *“Welsh speakers in the community”*, even within many parts of the heartland areas. (Williams, 2009 in Pertot p110). Additionally, despite the activities of the Mentrau Iaith (‘Language Ventures’) network – one stop shops promoting Welsh within the community – other commentators have noted the exclusion of Welsh from prestigious domains such as economics leading to *“considerable social and economic costs in the denial of dignity and hence the self-confidence of the speaker”* (Price et al).

In the light of this, a recent report of the Welsh Language and Economic Development Task and Finish Group (WLEDTFG) has suggested that the Welsh government ought to develop *‘a strategy to encourage and facilitate the use of the Welsh language as a marketing tool’* and to promote the benefits that bilingualism can bring to business (WLEDTFG 2014). The WLEDTFG report suggests a joint approach to economic development and the language, adopting an area based approach, within which there would be the designation of ‘special economic language zones’. WLEDTFG also call for the gathering of evidence *‘on the impact of, and the links between, the Welsh language and the economy’* (2014, p 6).

### **The Republic of Ireland**

Despite the privileged socio-political position of Irish compared to other minority languages contexts as the national and first language of the Republic of Ireland and with 13 percent of respondents identifying themselves as Irish speakers in the Irish Census of 2001, this has not however been a guarantee for its revitalization or spread into business use. Although Ireland established the Údarás na Gaeltachta, – the Gaeltacht Development Authority – a body designed to promote the Gaeltacht economically, culturally and socially in 1980, replacing the previous body Gaeltarra Éireann, according to O hAoláin no serious effort was made to develop a new economic base in the Gaeltacht area between the foundation of the Irish Free State in 1922 and the establishment of Gaeltarra Éireann in 1957.

Referring to Ireland's actual practice O hAoláin (2009) claims *"we do not have a track record of consciously utilizing the Irish language for economic development purposes, in fact there is a history of our people jettisoning their language as it was for long seen as an impediment to personal success and economic progress"* adding that *"Making Irish the language of the workplace is as challenging as making Irish the language of the home"*. O hAoláin suggests that in many ways Irish is what may be referred to as an 'associated language' where the language continues to be upheld as a constituent part of a country's heritage but is not widely used.

Walsh has referred to the whole of Ireland as now being a 'Breac-Ghaeltacht' ('speckled Gaeltacht') where the separating of the official Gaeltacht from non-Gaeltacht areas is a 'dichotomy which is becoming very difficult to sustain' (Walsh, 2009, p22).

### **A brief comparison of Catalan and Basque**

Beyond the British Isles, it is worth noting that even where 'minority languages' are major languages – such as the case with the Catalan speaking community, which comprises 9 million speakers in Eastern Spain, France, Andorra, and Sardinia, and thus is a medium-sized language in global terms, there is no immediate direct translation into the world of business or commerce when another language is majoritarian – such as Castilian, French or Italian. Thus Branchadell and Melià point out that *"Catalan does not enjoy a habitual presence in the majority of the many areas that make up what we repeatedly refer to as the 'world of business and consumer affairs'"* (Branchadell 2011 p 221). This is despite the widespread use of Catalan in many domains and *"the implementation of some significant policies creating and supporting the media and arts in Catalan"* (Gifreu 2011 p184).

In contrast to the above, however, the most recent report from the Basque Research Centre indicates that in the Basque country, the 'language sector industries' have had an increased turnover in the period up to 2013<sup>8</sup> and have succeeded in employing more people, with a three year aim adopted of encouraging multilingual management in companies, boosting language technologies for intelligent specialisation and projecting Euskadi (Basque) as a model for other minority languages (Basque Research 2013<sup>9</sup>).

With perhaps the exception of the situation in the Basque country, this summary on the situation of minority language use within business – when faced with the power of a hegemonic majority language – suggests a continuing limitation on the readiness of minority language speakers, not only in Scotland but also in Wales and Ireland to confidently use their own minority language as a language of business. The historical context for this within Gaelic Scotland can be seen further in Annex 4.

<sup>8</sup> 2013 turnover was approximately €278,000,000 – an increase of 0.5% on the previous year, with employment of 5,085 people – an increase of 1.26% on the previous year.

<sup>9</sup> See <http://www.basqueresearch.com>

## Possible paradigms in favour of extending minority language use in the economy

### Two overall frameworks for understanding the link between minority languages and the economy

Given the increasing acknowledgment of the potential of minority languages in social and economic development by policy makers today, several general approaches have emerged in recent years which try to consider the issue of minority languages and their use in development. The subsequent sections of this report will show that these approaches receive some considerable support from many of the observations found when consultees were asked to consider Gaelic as an asset.

Walsh (2009) has helped develop this framework by recently identifying three main historical approaches which are:

- **The Minority Language Promotion Approach:** This involves consideration of linguistic human rights, and of seeing language as part of national cultural identity;
- **The Socio-cultural Development Approach:** this considers language (in its connection to culture) as part of wider human development together with its connection to empowerment, self-confidence, social cohesion, initiative and participation.
- **The Economic Growth and Modernisation approach:** This tends to dismiss minority languages and culture as impeding or holding back progress, which is essentially seen to be science based and using major, global languages. (Walsh 2009).

Having considered these three approaches, Walsh argues for a new framework which he calls a **linguistic political economy of development**. His approach would tend to be one favouring strengthening clusters of language based institutions and industries<sup>10</sup> (such as in the media, arts/culture and the public service), which then interacts with micro-level community groups, and creates an enhanced public perception of the usefulness of the minority language (Walsh uses case studies in the Republic of Ireland and in Northern Ireland). He acknowledges that the influence of Irish tends to be stronger in areas where the market contains firms whose operations are directly related to Irish itself, but also sees a major tension due to what he calls insensitive planning that brings predominantly English speakers into Irish speaking areas. He concludes that *“examining the influence of Irish in terms of economics alone would be far too narrow a focus”* and argues for *“links between the promotion of Irish and the broad, holistic concept of socio-economic development in a number of settings, particularly the Gaeltacht”*.

Much of this approach would seem to fit well with aspects of the evidence presented later in this report where there are strengths clearly shown by the language in various sectors, such as in media, arts and culture, albeit not all in traditional Gàidhealtachd areas. It is also important to acknowledge the existing strengths in traditional Gaelic speaking areas, allowing the Gaelic Language Plans of, for instance The Highland Council and Comhairle nan Eilean Siar to directly link the development of Gaelic with that of the economy.

<sup>10</sup> Which may be a key factor in the Basque approach mentioned above.

From a slightly different direction, language economist Francois Grin suggests in a recent seminal paper on *Promoting Language Through the Economy: Four Competing Paradigms* that four main paradigms can be used to link minority languages and economics, and these are:

- **Firm, market and management** (looking at boosting productivity through skills found in bilingual/minority language communities).
- **The Development paradigm** (which argues that real sustainability in an economy must include all local attributes, including the diversity found in minority language communities).
- **The language sector and multiplier paradigm** (Much of the work on Scottish Gaelic, he believes, has looked at this area).
- **The Welfare paradigm.** This latter approach sees linguistic diversity as a public good akin to environmental quality, where support for minority languages can generate net value in a community – as a carrier of culture and identity for instance. This regards the benefits of minority languages as often being intrinsic to the production of goods and services, although not easily calculable.

Within Grin's approach, it would seem that positive arguments can be made for the case for Scottish Gaelic as an asset (based on the evidence found later in this report) – certainly from the last three of these paradigms – the current weakness of the language in all likelihood meaning the first is not attainable in any real sense at present.

Acceptance of the second and fourth paradigm would add to the more strictly economic arguments of Walsh's **linguistic political economy of development** (the third – that of the 'language sector and multiplier paradigm' could be arguably seen as being contained within it already).

Adding this concept of diversity as a 'public good' similar to environmental quality, bringing net value to a community, would seem to connect to many of the viewpoints expressed by Gaelic speakers in this report, who acknowledge that Gaelic is clearly an asset to the operations of their businesses – albeit one whose impact is difficult to capture in a simplified manner as might be suggested by trying to encapsulate it solely through the calculation of a percentage addition to turnover, profit or employment levels.

## Key Findings – Section 2

- **Gaelic has shown a remarkable resilience** in the face of challenges set against it historically and in the modern era, and is **showing encouraging signs of renewal in certain demographics**.
- According to the 2011 Census, there are 57,375 Gaelic speakers in Scotland (approximately 1.1% of the population). By far the highest concentration is in the Outer Hebrides, followed by Skye and Lochalsh, the offshore islands of Argyll and Bute, the rest of the Highlands and of Argyll and Bute and specific areas in other authorities. Due to a long term shift towards urban areas there are now in the region of 10,000 speakers of Gaelic in the greater Glasgow area, and likewise a substantial number in the Edinburgh area (almost 6,000). **Overall, according to the Census approximately 87,000 individuals were claimed to have ‘some knowledge of Gaelic’ in 2011.**
- There is a substantial feeling of **goodwill** towards Gaelic shown by the majority of the Scottish people as expressed in public attitude surveys. In general this is also being expressed in the tone in which Gaelic is discussed in the press.
- Benefits of Gaelic in **helping decode Scotland’s past** and in general the **benefits of bilingualism** within Scottish society are being increasingly acknowledged.
- **Gaelic Language Plans are now allowing local approaches to Gaelic to be discussed** although much still remains to be done in terms of successful strategies regarding capacity building. The changing nature of Gaelic communities in Scotland, within and outwith the traditional Gàidhealtachd are throwing up new challenges to policy and also new opportunities amongst the ‘New Gaels’ in Scotland.
- The **positive role that Gaelic, in particular Gaelic arts and cultural activities, can play in economic activities**, particularly in the media and in events such as Celtic Connections, **are now generally acknowledged by policy makers**, although more needs to be done to broaden and increase this awareness. Issues of skills accreditation remain, as do attitudinal issues regarding domains in which Gaelic is not yet seen as being used, or having the potential to be used, as an asset.
- The problems facing Gaelic as a minority language within a context of majority English use, are not limited to Gaelic alone, but are encountered by other minority languages such as Welsh and Irish. Despite this, a positive framework can be developed around a **‘linguistic political economy of development’** where language, culture and development can co-exist positively and work with each other.

## Prìomh Thoraidhean – Roinn 2

- **Tha a' Ghàidhlig air tapachd iongantach a shealltainn** mu choinneamh dhùbhlain a bha na h-aghaidh gu h-eachdraidheil agus anns an latha an-diugh, agus **tha coltas ann gu bheil seallaidhean de dh'ùrachadh a' nochdadh ann an sluaigh-thomhais àraid.**
- A rèir cunntas-sluaigh 2011, tha 57,375 neach-labhairt Gàidhlig ann an Alba (timcheall air 1.1% den t-sluagh). Tha an dùmhlachd as motha, gun teagamh, ann an Innse Gall, an uair sin san Eilean Sgitheanach is Loch Aillse, ann an eileanan far-chladaich Earra-Ghàidheil is Bhòid agus ann an sgìrean sònraichte ann an ùghdarrasan eile. Air sgàth gluasad fad-ùineil a dh'ionnsaigh sgìrean bailteil, tha a-nis timcheall air 10,000 neach-labhairt Gàidhlig ann a' sgìre bhaile Ghlaschu agus mar an ceudna, deagh àireamh ann an sgìre Dhùn Èideann (faisg air 6,000). **Gu h-iomlan, a rèir a' chunntais-sluaigh, bha 87,000 neach a' cumail a-mach gun robh 'tomhas de dh'aithne aca air Gàidhlig' ann an 2011.**
- Tha faireachdainn susbainteach de dheagh-ghean ann a dh'ionnsaigh na Gàidhlig bhon mhòr-chuid de mhuinntir na h-Alba, mar a chaidh a chur an cèill ann an suirbhidhean air beachdan a' phobaill. San fharsaingeachd tha seo cuideachd ga chur an cèill san dòigh anns a bheil a' Ghàidhlig air a deasbad anns na meadhanan sgrìobhte.
- Thathar cuideachd a' faicinn barrachd aithne ga thoirt do bhuannachdan na Gàidhlig ann a bhith a' tuigsinn eachdraidh na h-Alba agus, san fharsaingeachd, do bhuannachdan dà-chànanais taobh a-staigh comann-shòisealta na h-Alba.
- Tha buannachdan na Gàidhlig ann a **bhith a' tuigsinn eachdraidh na h-Alba** agus, san fharsaingeachd, **do bhuannachdan dà-chànanais** taobh a-staigh comann-shòisealta na h-Alba a' sìor fhaighinn aithne.
- **Tha Planaichean Cànanais a-nis a' ceadachadh tharraingean ionadail a thaobh na Gàidhlig a dheasbad** ged a tha fhathast mòran ri dhèanamh a thaobh a bhith a' leasachadh agus a' buileachadh ro-innleachdan shoirbheachail co-cheangailte ri neartachadh chomasan. Tha an dòigh sa bheil coimhearsnachdan Gàidhlig ag atharrachadh ann an Alba, taobh a-staigh agus a-muigh na Gàidhealtachd thraidiseata, a' nochdadh dhùbhlain ùra a thaobh poileasaidhean agus cuideachd cothroman ùra am measg nan 'Gàidheal Ùra' ann an Alba.
- Tha an **dreuchd dhearbhadh is urrainn don Ghàidhlig a ghabhail ann an gnìomhan eaconamach, gu sònraichte ann an gnìomhan ealain is cultarail na Gàidhlig**, agus gu h-àraid anns na meadhanan agus ann an tachartasan leithid *Celtic Connections*, **a-nis a' faighinn aithne bho luchd-dèanaimh phoileasaidh**, ged a tha mòran a bharrachd a dh'fheumar a dhèanamh airson an aithne seo a mheudachadh is a leudachadh. Tha ceistean a thaobh barrantachadh sgilean fhathast gun fhuasgladh, cho math ri ceistean mu bheachdan a thaobh raointean far nach eil a' Ghàidhlig fhathast ga faicinn mar so-mhaoin, no le comas a bhith na so-mhaoin.
- Chan eil na duilgheadasan a tha mu choinneamh na Gàidhlig, mar mhion-chànan ann an co-theacsa far a bheil a' Bheurla air a cleachdadh leis a' mhòr-chuid, a' bualadh air a' Ghàidhlig a-mhàin, oir tha mion-chànain eile leithid Cuimris agus Gàidhlig na h-Èireann anns an aon suidheachadh. A dh'aindeoin seo, gabhaidh frèam dearbhach a chur air bhonn co-cheangailte ri **'eaconamaidh leasachaidh cànanach poileataigeach'** far an tig cànan, cultar is leasachadh beò còmhla ann an dòigh dhearbhadh agus obraichidh iad le chèile.

### 3. ROLE OF GAELIC AS AN ECONOMIC AND SOCIAL ASSET: AN OVERVIEW

This section draws on the findings from the primary research – the business/social enterprise and community group surveys, the focus groups, and the one-to-one interviews – and focuses on two aspects:

- Firstly, the **use of Gaelic by businesses and community organisations** – i.e. how and where Gaelic is used by businesses, social enterprises, community groups and organisations.
- Secondly, the **role of Gaelic as an asset for business and community groups** – i.e. how important Gaelic is to the business/organisation, whether or not it is an asset to the business/organisation, and the different ways in which it adds value as an asset.

Some of the wider issues around Gaelic development – including both the concerns expressed by some consultees about this research focusing on the use of Gaelic as an economic asset and the potential for exploiting, or even demeaning, the language by treating it in this way (linking to the issues around ‘tokenism’ discussed in Section 2), and also the importance of the wider inter-relationships and two-way interactions between Gaelic development and economic development (again as set out in Section 2), are dealt with in Section 5 of this report.

#### Use of Gaelic by Businesses and Community Groups

To be able to consider the extent to which Gaelic is an asset for a business, social enterprise or community organisation, it is important to understand the role and use of Gaelic within the businesses/organisations.

Each of the main primary research routes sought to understand and identify the role of Gaelic within the business/organisation, and also the scale to which it is used.

The results from the business survey show that the majority (60%) of respondents stated that Gaelic is used, or features, as a key element of the business’s/enterprise’s main activities, products or services (see Table 3.1).

TABLE 3.1: Is Gaelic used, or does it feature, as a key element of your business’s/enterprise’s main activities, products or services?		
	Response Percent	Response Count
Yes	60.0%	81
No	40.0%	54

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=135)

It is interesting to note this finding given that later in this section, when the role of Gaelic as an asset is considered, a higher proportion of businesses regard Gaelic as an asset than report that Gaelic is used or features as a key element of the business – **suggesting that for some, Gaelic is an intrinsic but implicit element (and asset) for the business.** This can perhaps be regarded as evidence of the existence of Grin’s ‘firm, market and management paradigm’ as set out in Section 2 of this report.

**TABLE 3.2: Is Gaelic used, or does it feature, as a key element of your organisation's main activities or services?**

	Response Percent	Response Count
Yes	84.8%	39
No	15.2%	7

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=46)

The results from the community organisation/group survey are even more pronounced, with 85% of respondents stating that Gaelic is used, or features, as a key element of the organisation's main activities or services (Table 3.2 above).

### Ways in which Gaelic is used by Businesses and Community Groups

The ways in which Gaelic is used by businesses and community organisations are wide and varied – for some businesses Gaelic is at the core of everything they do, for others it is the language of communication, others use it within business/product names, or as a feature of marketing. Common ways in which Gaelic is used include the following, each of which is explored in more detail below.

- **Gaelic as the explicit heart/core of the business** – where Gaelic (as a language, as well as Gaelic music, Gaelic heritage, Gaelic events, etc.) is fundamental to the business/organisation. Examples include: Gaelic media, Gaelic publishing, Gaelic learning, Gaelic arts, music and literature.
- **Gaelic as an inherent/implicit element of the business** – where Gaelic (language, culture and heritage) has influenced and inspired the business, but in ways that are implicit rather than explicit. Examples exist in businesses and organisations across a wide range of sectors, where the influence of, and inspiration from, Gaelic has played an intrinsic part in the development of the business or organisation.
- **Gaelic being used as the business name or product names** (or part thereof) – including for business names, product names, company logos, etc..
- **Gaelic being used in signage for the business** – either on its own, or as part of bilingual signage.
- **Gaelic as the language of the workplace** – where Gaelic is the language of communication between staff.
- **Gaelic as the language of external communication** – where Gaelic is the used in communication between staff and customers, staff and suppliers, etc...
- **Gaelic being used as part of advertising, promotion and marketing** – including use on websites (on its own or bilingually).
- **Gaelic being used to enhance the experience** – for visitors (e.g. to museums and heritage sites), customers, etc.
- **Gaelic being used to make events, performances, bilingual** – i.e. Gaelic language being a key part of events, performances, etc.



## Where Gaelic is core/fundamental to the business

A number of the businesses and community organisations who engaged in this study were clear that **Gaelic was fundamental to their organisation**. Some examples of this are set out below<sup>11</sup>.

For example, Gaelic is fundamental to **Sabhal Mòr Ostaig** (SMO) on Skye, and supports over 132 FTE jobs and income of £3.3million through traditional educational activities, student and staff spend, national and international conferences, investment in infrastructure, supporting local services and infrastructure, and benefits derived from community use of facilities. These impacts will be augmented as a result of current and planned development (such as the Kilbeg Village initiative, and year round conferencing) and future opportunities (such as media and film sector development, cultural tourism etc.). These future planned activities and future opportunities will serve both the college and the community leading to benefits in income, profile, employment and innovation, and are a partnership-based suite of initiatives.

Another example is the **BBC Gaelic Unit and media production activity** with 118 mostly full-time jobs linked to Gaelic output at the BBC and associated organisations, and a BBC budget of around £4million plus additional commissions from MG ALBA, catering to a Gaelic heartland audience. As a result, most of this activity is entirely contingent on Gaelic, with much of the employment being Gaelic 'essential', or 'desirable' at the very least.

The heartland audience for the BBC ALBA service, produced as a joint venture between the BBC Gaelic Unit and MG ALBA, has a huge sense of ownership in the channel and its programming. BBC ALBA supports a range of production and technical support activity (including **independent production companies**), much of which involves businesses and organisations for which Gaelic is similarly fundamental and their main activity, where the BBC/MG ALBA is the main (and often only) client/customer/partner.

There are a number of organisations and businesses involved in **Gaelic arts and music**, ranging from engagement with specific communities to the entire Gaelic diaspora. These include Pròiseact nan Ealan (PnE), who engage in work that enhances the attractiveness of the language to both Gaelic and non-Gaelic speakers. For some music organisations, the role of Gaelic is clear: *"without Gaelic An Communn Gàidhealach and the Mod(s) wouldn't exist"*.

**Gaelic literature** involves a range of authors and publishers in a range of forms, and markets include libraries and schools (supported by Gaelic-Medium Education) and universities in addition to bookshops across the Gaelic diaspora. Recognition for Gaelic literature includes the Saltire Society Scottish First Book Award 2013 being awarded to the first Gaelic science fiction novel (Air Cuan Dubh Drilseach by Tim Armstrong), whilst Martin MacIntyre won the same award previously for his Gaelic work Ath-Aithne (Reacquaintance). A publishing-related Gaelic business acknowledges the importance of Gaelic to its operation: *"[the business] wouldn't exist had it not been established to support Gaelic Medium Education!"*

<sup>11</sup> It is fully acknowledged that other additional businesses and organisations could also be included here, but those listed are simply intended to be exemplars of this category, not a complete list.

There are also a range of businesses and organisations who focus on **Gaelic language** (i.e. teaching, developing materials and translation), and clearly Gaelic is fundamental to them. Interestingly some of these businesses are run/managed by Gaelic learners, suggesting that Gaelic can create opportunities for those who have not been brought up with Gaelic, but have chosen to get involved in and learn the language (providing evidence of examples of the rise of the ‘New Gael’ as discussed in Section 2).

There are a number of businesses and community organisations involved in supporting Gaelic Medium Education, and also the **development of Gaelic education and learning** in communities – again, the role of Gaelic is fundamental to these businesses and organisations.

There are businesses in the **tourism** sector where Gaelic is a fundamental part of the offer. For example, **Grogarry Lodge** offers Gaelic immersion weekends<sup>12</sup>, where Gaelic is part of the cultural experience. **Wild and Magic Islay** offers a holiday experience to support Gaelic learning, the Spirit of Gaelic and Culture Tour<sup>13</sup>. At **Aros Visitor and Arts Centre** in Skye, which was established to tell the Skye story, Gaelic underpinned its establishment and features strongly in its events, and contributes directly to around half of the turnover of the business. Aros deliver an arts programme, some of which is through the medium of Gaelic, and regard Gaelic as integral to Aros’s relationship with its communities and audiences.

There are a range of **community centres and community hubs** where Gaelic is fundamental to the ethos. For example, **Ionad Chalum Chille Ìle** (ICCI) the Columba Centre on Islay note that “As a Gaelic Heritage and Language Centre, Gaelic is at the centre of all we do”. Similarly, for **Co-Chomunn na Pairc/Ravenspoint** on Harris:

*“Sustaining and promoting Gaelic is an important part of Co-Chomunn na Pairc’s main charitable objective – community development. Gaelic is also an important part of what we have to offer visitors - who are increasingly wanting something distinctive and different from other holiday destinations”.*

There are also a range of other **creative industries businesses** where Gaelic is regarded as being fundamental to the business – including **arts centres/cultural hubs**, and microbusinesses operating in the digital/creative/design fields:

*“Most of my work comes from working with Gaelic organisations... If I didn’t have Gaelic, it wouldn’t be possible for me to work with these organisations”.*

*“Gaelic is at the heart of everything I do - I am either working through Gaelic, or using English to promote Gaelic”.*

*“If we weren’t working in the Gaelic environment, our company wouldn’t exist”.*

<sup>12</sup> <http://www.grogarrylodge.com/>

<sup>13</sup> <http://www.wildandmagicislay.com/spirit-of-gaelic-and-culture-tour/>

## Where Gaelic has an important (but not fundamental) role

Many businesses and community groups use Gaelic in **promotion and marketing**, and some use Gaelic to enhance **branding** (where its role as an asset is dependent upon how it enhances the brand in question). Gaelic is also used, as noted in Section 2 of this report, by businesses and community groups for bilingual signage and interpretation.

**Artists** specialising in Gaelic find the level of demand for Gaelic specific commissions varies, and can be dependent upon relationships with Gaelic development and Gaelic language officers. Many writers and performers reported that they write and perform in Gaelic, with a number of local events and also events as part of larger festivals being mainly, or exclusively, in Gaelic.

In a **tourism** context, whilst it is less clear how much of an attraction Gaelic represents in isolation, many festivals (such as the Mod, the Fèisean, Blas, and Celtic Connections (as highlighted in Section 2 of this report and also in the case studies in Section 4)), and local events (such as Barralìve) have Gaelic language, culture and music at their heart.

There are many good examples of **hotels** using Gaelic as part of the **visitor experience**, for example through immersion courses, or to reinforce authenticity, or to respond to visitor wishes to hear the language spoken (and sung) locally (“This has become a little marketing tool without trying it. *Didn’t intend it, but when tourists come here they recognise it – we have music twice a week, and they’ll hear Gaelic there*”). However, for most business consultees having Gaelic is not essential when employing staff, although if two candidates were equally qualified in all other aspects, many such hoteliers acknowledge they would opt for the Gaelic speaking candidate.

Within the **arts and creative industries** many businesses acknowledge the important role of Gaelic – including for **individual artists and creative micro-businesses**:

*“...being a Gaelic speaker is of great interest to my customers who come from all over the world. I think this contributes to the success of the business. Some visitors are learners and keen to engage in conversation”.*

*“At the moment, Gaelic features in just one of the projects in my portfolio of work. It’s critical to that project, but not at all important to the others”.*

In addition, the role of Gaelic for those in the **heritage** sector is recognised, although the role of Gaelic can vary significantly from place to place:

*“For some visited properties, Gaelic is central. For the organisation as a whole, Gaelic is important but not the dominant theme for most properties”.*

*“I feel adding Gaelic in any way we can to museum activities meets expectations of a unique Scottish culture from our visitors (although it has to be said that interest is more from the rest of Britain and from abroad than from the native population.)”*

*“It’s of interest to our visitors, but it’s not a reason for coming to the site”.*

*“Gaelic is used on external signage, on interpretation within the [...] Centre and on the website, all of which are partly bilingual. The Gaelic heritage of the area is also examined in the exhibition. However, it is not a key element of our activities, since less than 1% of our visitors are able to read it and the vast majority would not notice its absence”.*

## Role of Gaelic in Communication

In terms of communication for the businesses and organisations – both internally within the business/organisation and also externally with clients, customers, users, participants, visitors, etc. the survey results show the role of Gaelic in these aspects of communication.

The business survey (Table 3.3) shows that for internal communication, English is the dominant language spoken – with more than half (52%) of the businesses responding stating that it is ‘always English’ that is spoken, with a further quarter (24%) of respondents stating the language spoken is ‘mainly English’. In comparison, 7% report the language spoken as always Gaelic and 6% report it as ‘mainly Gaelic’.

**TABLE 3.3: In terms of the day-to-day INTERNAL COMMUNICATION (i.e. communication within the business), which of the following best describes the language(s) spoken:**

	Response Percent	Response Count
Always Gaelic	6.6%	7
Mainly Gaelic	5.7%	6
English and Gaelic equally	12.3%	13
Mainly English	23.6%	25
Always English	51.9%	55

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=106)

Given this pattern of communication, it is not surprising that when asked about the importance of the role of Gaelic for internal communication (Table 3.4), less than 30% regard Gaelic’s role as important or critical – compared to more than 70% describing it as having either a minor role or no role.

**TABLE 3.4: How important is the Gaelic language in this regard?**

	Response Percent	Response Count
Critical role	16.2%	17
Important role	12.4%	13
Minor role	20.0%	21
No role	51.4%	54

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=105)

For external communication, the pattern is very similar (Tables 3.5 and Table 3.6), with English once again being reported as the dominant language by businesses.

**TABLE 3.5: In terms of the day-to-day EXTERNAL COMMUNICATION (i.e. day to day communication with clients, customers etc.), which of the following best describes the language(s) spoken:**

	Response Percent	Response Count
Always Gaelic	6.7%	7
Mainly Gaelic	4.8%	5
English and Gaelic equally	10.5%	11
Mainly English	27.6%	29
Always English	50.5%	53

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=105)

**TABLE 3.6: How important is the Gaelic language in this regard?**

	Response Percent	Response Count
Critical role	11.4%	12
Important role	19.0%	20
Minor role	21.0%	22
No role	48.6%	51

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=105)

From the perspective of **community organisations/groups**, there is evidence of an increased role for Gaelic in internal communication, compared to businesses and social enterprises. There is a greater proportion of respondents identifying the language spoken as either 'mainly Gaelic' or 'English and Gaelic equally' (Table 3.7), with a resultant shift in the importance of Gaelic.

The importance of Gaelic (Table 3.8) is almost equally split between those that regard it as 'critical' or 'important' (49%) and those that regard it as having a 'minor role' or 'no role' (51%).

**TABLE 3.7: In terms of the day-to-day INTERNAL COMMUNICATION (i.e. communication within the organisation), which of the following best describes the language(s) spoken:**

	Response Percent	Response Count
Always Gaelic	2.3%	1
Mainly Gaelic	16.3%	7
English and Gaelic equally	16.3%	7
Mainly English	30.2%	13
Always English	34.9%	15

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=43)

**TABLE 3.8: How important is the Gaelic language in this regard?**

	Response Percent	Response Count
Critical role	25.6%	11
Important role	23.3%	10
Minor role	20.9%	9
No role	30.2%	13

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=43)

For external communication, the pattern is very similar (Tables 3.9 and Table 3.10), with Gaelic and English equally accounting for more than 30% of responses, compared to 60% reporting mainly or always English.

Again, the importance of Gaelic is more or less equally split between those that regard it as 'critical' or 'important' (46.5%) and those that regard it as having a 'minor role' or 'no role' (53.5%).

**TABLE 3.9: In terms of the day-to-day EXTERNAL COMMUNICATION (i.e. day to day communication with users, participants, beneficiaries, visitors, customers etc.), which of the following best describes the language(s) spoken:**

	Response Percent	Response Count
Always Gaelic	2.3%	1
Mainly Gaelic	7.0%	3
English and Gaelic equally	30.2%	13
Mainly English	27.9%	12
Always English	32.6%	14

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=43)

**TABLE 3.10: How important is the Gaelic language in this regard?**

	Response Percent	Response Count
Critical role	25.6%	11
Important role	20.9%	9
Minor role	25.6%	11
No role	27.9%	12

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=43)

There are examples of businesses and community organisations/groups interviewed or involved in the focus groups that use Gaelic as the **main language in the workplace**. This is to be expected with those businesses and groups whose primary purpose is related to Gaelic (such as media, music, literature and translation services). A few extend this use into board meetings as well, with others acknowledging that whilst they currently hold meetings in English, these ideally should be in Gaelic. As an example, one business, whose core activities are in land management and development, has a board of directors that speak Gaelic in meetings and also in email communications between Gaelic speakers.

Other businesses reported that Gaelic was an **informal language in the workplace** – i.e. it is used verbally, including on occasion with customers and contactors/suppliers, but all formal communication (i.e. written contracts, policies and formal letters) is in English.

This point can be illustrated through the quotes below from four different businesses/ community organisations.

*“Gaelic is the language of the office, in the creation of all projects where possible and in their delivery”.*

*“Gaelic is used on a daily basis both by staff conversing amongst themselves and also to patients and residents and visitors”.*

*“Gaelic is important as the main language of communication used internally by many of our staff”.*

*“If people speak Gaelic, they speak Gaelic, but they don’t understand what this has to do with business”.*

In crofting areas Gaelic carries the culture and heritage of the communities, and the presence of Gaelic helps people feel part of the community, fitting in which Walsh’s ‘linguistic political economy of development’ framework highlighted in Section 2 of this report.

The development of community shops within Gaelic speaking areas often include a strong Gaelic element in their ethos, approach and marketing. For example, **Eriskay Community Cooperative**<sup>14</sup> (**Co-Chomunn Eirisgeidh**) competed in ‘Gaelic Business of the Year’. Eriskay is a strong Gaelic speaking area, and Gaelic is spoken in the shop, which sells Eriskay Jerseys as well as everyday products, and profits are reinvested in the cooperative. On Barra, **Bùth Bharraigh**<sup>15</sup> uses Gaelic in its branding, but English is spoken in the shop (only three out of the ten volunteers have Gaelic). Products and produce is stocked from local producers and makers, who decide the extent to which Gaelic is used in branding on a case by case basis.

### **Role of Gaelic in Promotion and Marketing**

The role of Gaelic in terms of promotion, marketing and sales information was also assessed. The results from the business survey (Table 3.11) show, not surprisingly, a dominance of English, with just over 5% reporting Gaelic as the dominant language for promotion, marketing and sales, and 16% noting that Gaelic and English are equally used. It is notable, especially given the level of Gaelic ability (as set out early in Section 2) that more than one-fifth of respondents use Gaelic dominantly, or at least on an equal basis with English, in promotion and marketing – suggesting that this cohort of businesses see added value in using Gaelic in this way.

<sup>14</sup> <http://www.communityshops.coop/eriskay-community-co-op-co-chomunn-eirisgeidh>

<sup>15</sup> <https://www.facebook.com/ButhBharraigh>; and @ButhBharraigh.

**TABLE 3.11: In terms of PROMOTION, MARKETING AND SALES information (i.e. promotion and marketing of your products/services), which of the following best describes the language(s) used:**

	Response Percent	Response Count
Always Gaelic	3.8%	4
Mainly Gaelic	1.9%	2
English and Gaelic equally	16.3%	17
Mainly English	37.5%	39
Always English	40.4%	42

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=104)

Whilst accepting the dominance of English around promotion, marketing and sales, the importance of Gaelic is recognised by a larger proportion of respondents than for internal and external communication generally – with **more than one-third of respondents describing Gaelic’s role in promotion, marketing and sales as either ‘important’ or ‘critical’**. (Table 3.12).

**TABLE 3.12: How important is the Gaelic language in this regard?**

	Response Percent	Response Count
Critical role	14.7%	15
Important role	20.6%	21
Minor role	25.5%	26
No role	39.2%	40

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=102)

In an assessment of the types of businesses that identified the role of Gaelic as being *critical* for promotion and marketing two main sectors dominate – **creative industries** (e.g. music, arts, crafts, design, media, performance, etc.) and **learning and education**, with some businesses activities cutting across both of these sectors. In fact, taking a broad categorisation/definition for both of these sectors, **all of the businesses that regard Gaelic as having a critical role for promotion and marketing fall within either Arts & Creative Industries or Learning and Education**.

Those businesses that regard Gaelic as having an *important* role represent a wider mix of sectors – although **again, Arts & Creative Industries and Learning & Education are most prominent, with tourism-related businesses, food and drink businesses, as well as community centres/hubs, and heritage/museums being key examples where Gaelic is described as having an important role for promotion and marketing**.

The role of Gaelic in terms of promotion, marketing and sales information was also assessed for community organisations. These results (Table 3.13) show, not surprisingly, a dominance for English, with around 5% reporting Gaelic as the dominant language for promotion, marketing and sales, and 60% reporting English.

It is notable however, especially given the level of Gaelic ability (as set out early in Section 2) that 40% of respondents use Gaelic dominantly, or at least on an equal basis with English, in promotion and marketing – suggesting that this cohort of organisations see added value in using Gaelic in this way.



**TABLE 3.13: In terms of PROMOTING AND PUBLICISING your organisation (i.e. promotion and publicity of your organisation's activities, services etc.), which of the following best describes the language(s) used:**

	Response Percent	Response Count
Always Gaelic	2.3%	1
Mainly Gaelic	2.3%	1
English and Gaelic equally	34.9%	15
Mainly English	41.9%	18
Always English	18.6%	8
<b>Source:</b> Gaelic as an Asset, Community Survey, 2013 (n=43)		

However, the proportion reporting the use of English and Gaelic equally (35%) represents more than one third of respondents, and suggests that there is a **notable minority that use both English and Gaelic equally in their promotion and publicity.**

This is reflected in the importance of Gaelic in this regard (Table 3.14), where **more than half (53.5%) of respondents describe Gaelic's role in promotion and publicity as either 'critical' or 'important'.**

**TABLE 3.14: How important is the Gaelic language in this regard?**

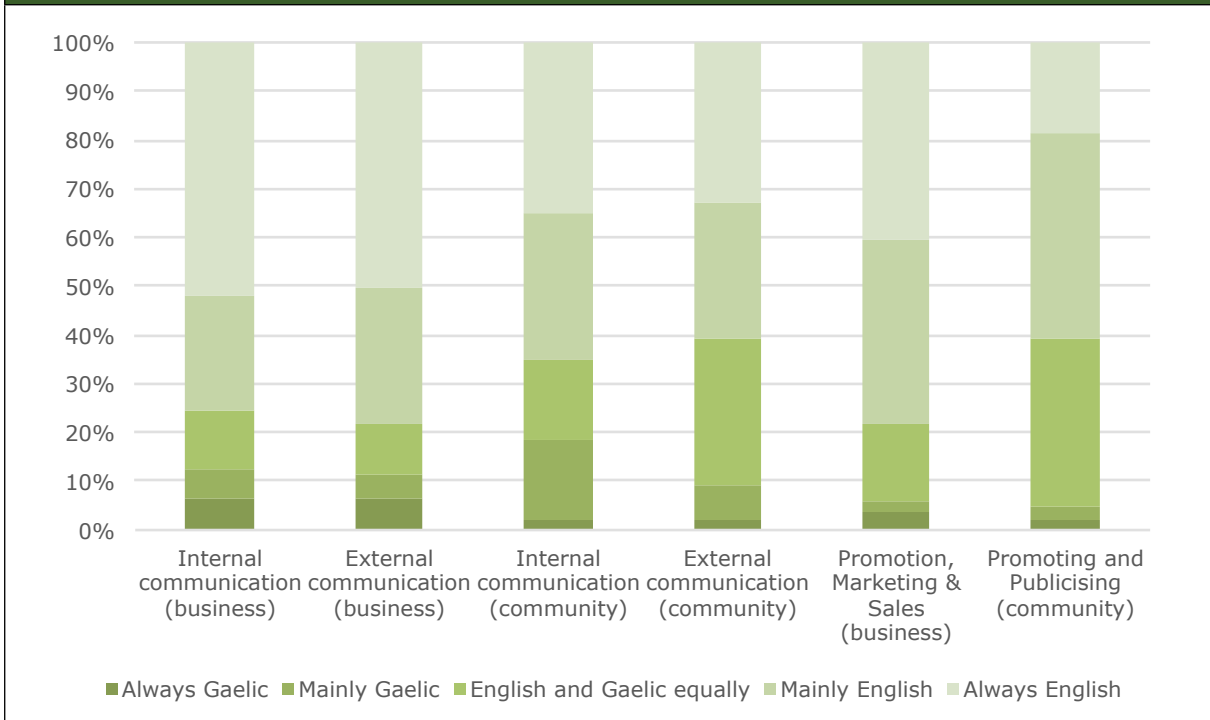
	Response Percent	Response Count
Critical role	23.3%	10
Important role	30.2%	13
Minor role	27.9%	12
No role	18.6%	8
<b>Source:</b> Gaelic as an Asset, Community Survey, 2013 (n=43)		

An assessment of the **types of community organisations that identified the role of Gaelic as being critical for promotion and publicising shows a dominance of arts (especially music) organisations and groups, as well as education/learning** (again many linked to music) with other examples including **Community Trusts** and **Historical Societies.**

Those organisations that regard Gaelic as having an important role represent a similar mix – with arts (especially music) and learning/education (including music and culture related) most prominent, with community centres/hubs, and heritage/museums being other examples.

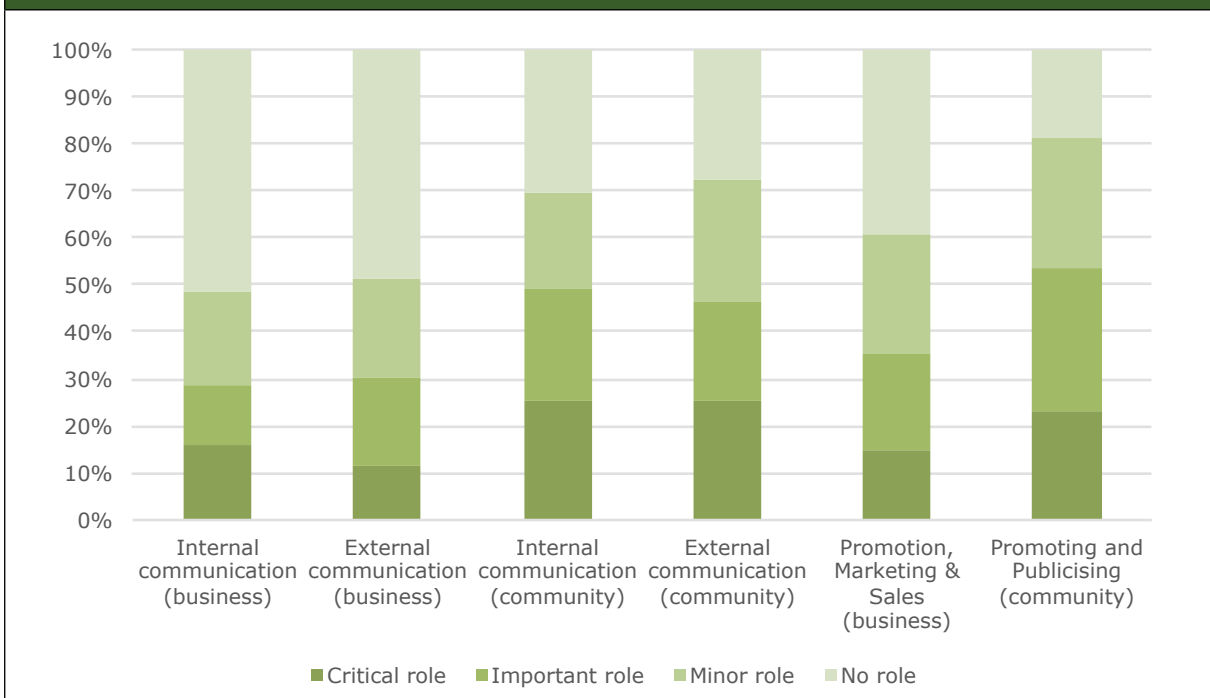
A summary of the role and importance of Gaelic in communication – covering internal and external communication as well as promotion and marketing is set out in Figures 3.1 and 3.2 and identifies the positive aspects around the role of Gaelic, especially how important it is (Figure 3.2) for both community groups/organisations and businesses, especially in promotion and marketing.

**Figure 3.1: Language spoken in day-to-day communication and promotion/ marketing/publicity**



Source: Gaelic as an Asset, Business Survey, 2013

**Figure 3.2: Importance of Gaelic in relation to various forms of communication**



Source: Gaelic as an Asset, Business Survey, 2013

## Gaelic as an inherent/implicit element of the business

Finally, there are some businesses where it might initially be expected that Gaelic would be explicitly used in some way, shape or form, but evidence suggests it is not used (or the use is minimal). Consultees highlighted the **Harris Tweed** industry in this context, whilst noting that its market is international, and that a Gaelic/homespun/island approach to marketing and branding would not relate to such markets. Many feel this is a significant missed opportunity for Gaelic (with one noting that ‘from the land comes the cloth’ slogan could be the oldest brand in the UK), and argue that hand woven tweed from the Outer Hebrides should be branded in Gaelic.

This lack of explicit use of Gaelic for Harris Tweed is counterbalanced by the acknowledgement that Gaelic is recognised as the language of the industry – in both the weaving communities themselves and also in the mills. However, the use of Gaelic in selling and marketing the cloth is far more subtle, and whilst it (promotion and marketing) does include some references to the fact that the communities have their own distinct heritage - including the Gaelic language, the explicit use of Gaelic in this regard is very low, with the exception of a small number of key phrases and straplines.

Another area where the role of Gaelic can be more implicit than explicit is within **food and drink** (with the exception of whisky) – and **seafood** in particular. Whilst firms such as Loch Duart Salmon and Barra Atlantic heavily market the origin of their catch and processing locations, with provenance being linked to the fresh clean waters around the Outer Hebrides, and thus intrinsically linked to place, such firms typically do not use Gaelic in their product labelling or branding.

Whilst place (and thus Gaelic culture and heritage) can be argued to be fundamental to the branding and marketing of such food and drink businesses, the language on its own is not, primarily because they service UK, European and international markets, and typically export substantial proportions of production outside the UK. Finally, for many of the food and drink businesses consulted in this research study, a common issue related to the fact that product labels often have to contain food standards compliance information, and therefore space is limited – making it almost impossible to even consider using Gaelic in the branding and labelling, irrespective of the desire and motivation of the businesses to do so.

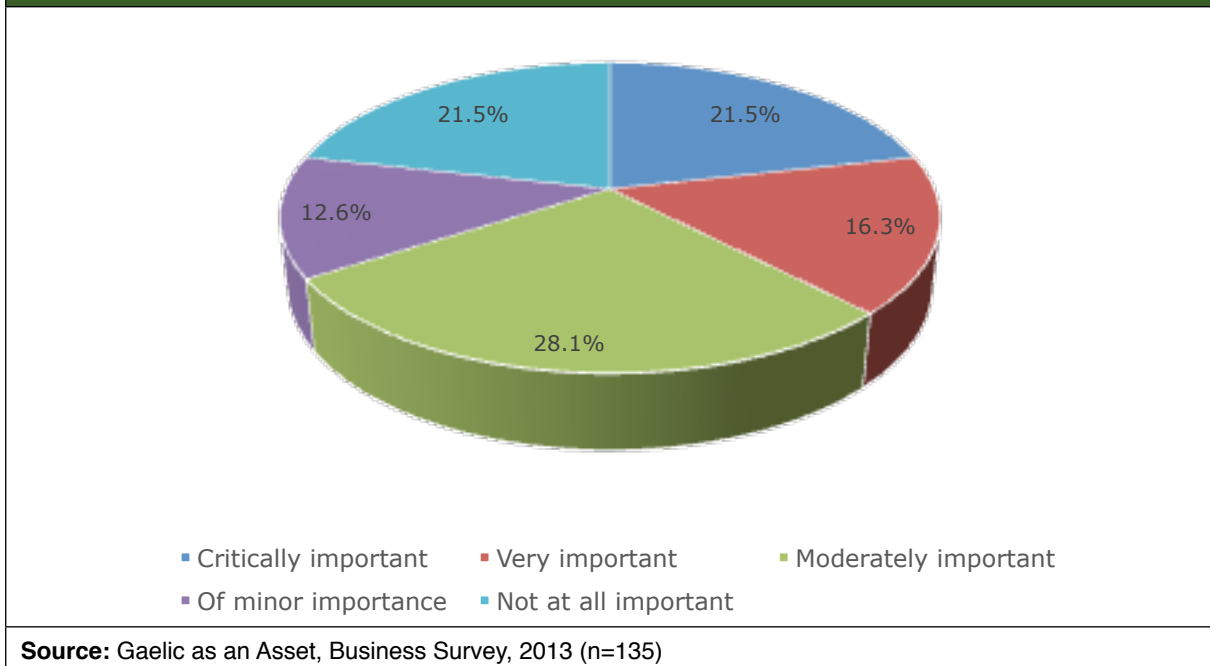
## Gaelic as an Asset for Businesses and Community Groups

Having identified the different ways in which Gaelic is used by businesses, social enterprises, and community groups and organisations, this section seeks to understand the **role of Gaelic as an asset for business and community groups** – i.e. how important Gaelic is to the business/organisation, whether or not it is an asset to the business/organisation, and the different ways in which it adds value.

First, the role of Gaelic – in terms of how important Gaelic is to the success of the activities, products and services of businesses and community groups – shows a mixed range of responses from the survey respondents.

The business survey results (Figure 3.3) show that for more than one-fifth of respondents, Gaelic is critically important, with almost two-thirds describing Gaelic as either moderately, very, or critically important. Conversely, around one-third, describe Gaelic as being of minor importance or being not at all important.

**Figure 3.3: In general, how important would you say Gaelic is to the success of the activities, products and services of your business/enterprise**

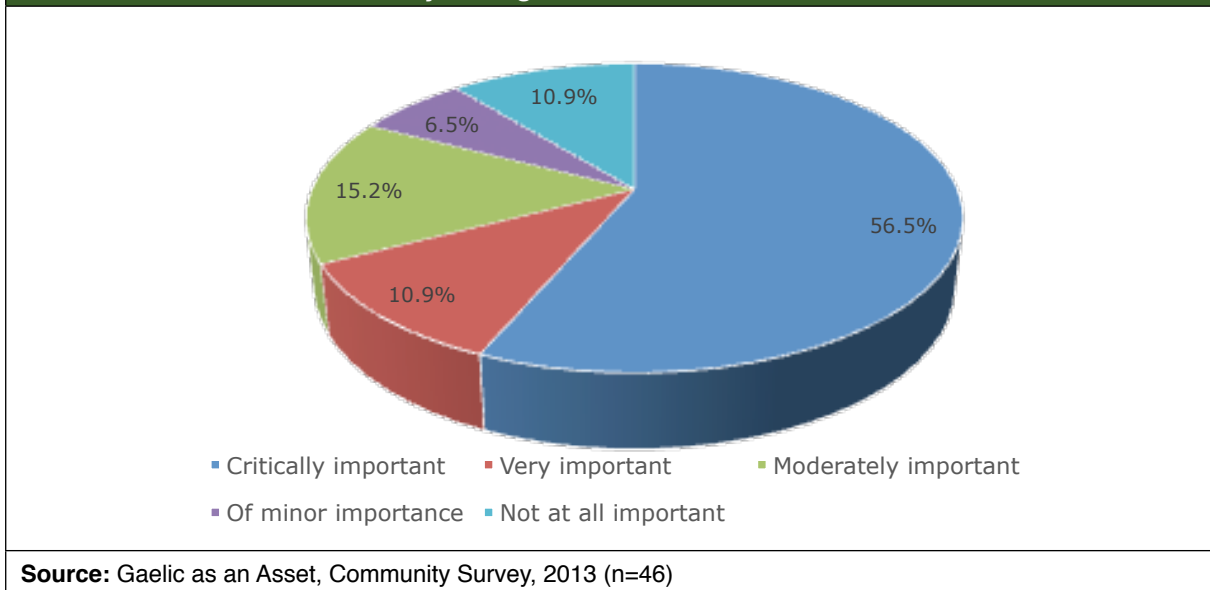


An assessment of the **types of businesses that identified Gaelic as being critically important to the success of the activities, products and services of the business shows that creative industries sectors are the most common** area of activity – covering music, art, design, performance, theatre, media, publishing, digital/ICT, etc. Other businesses that identify Gaelic as critically important to their success include those in the **heritage sector** (including natural heritage), and **learning** (including Gaelic learning).

Those **businesses that regard Gaelic as very important to the success of the activities, products, and services of the business present a similar pattern** – with the same mix of **creative industries sectors dominating**. In addition there are food and drink businesses, professional services (e.g. legal services), **land-based** businesses, and some general **retailers**, as well as **heritage** and **learning** businesses/organisations.

The community group/organisation survey results (Figure 3.4) show a notably higher level of importance afforded to the role of Gaelic, with more than half of respondents stating that Gaelic is critically important, and more than 80% of respondents describing Gaelic as either moderately, very, or critically important.

**Figure 3.4: In general, how important would you say Gaelic is to the success of the activities and services of your organisation**



An assessment of the **types of community organisations that identified Gaelic as being critically important to the success of the activities and services of the organisation shows a dominance of arts, music, and heritage organisations and groups, as well as Gaelic language learning organisations** (again with many linked to music, arts and heritage) with other examples including **community centres and community hubs**.

Table 3.15 and Table 3.16 summarise one of the key questions asked during the research – does Gaelic represent an asset to the business/enterprise, and does Gaelic add real value (and is an asset) to the community organisation.

Almost 70% of businesses responding said yes – Gaelic is an asset to their main business/enterprise activity (Table 3.15).

**TABLE 3.15: Overall, would you say that the use of Gaelic represents an asset to your main business/enterprise activity?**

	Response Percent	Response Count
Yes	69.3%	97
No	30.7%	43

Source: Gaelic as an Asset, Business Survey, 2013 (n=140)

In order to understand the types of businesses that regard the use of Gaelic as an asset, compared to those that do not, a sectoral analysis highlights some interesting points<sup>16</sup>.

- **First**, and consistent with previous findings, those businesses categorised as arts & creative industries account for the largest proportion of businesses stating that Gaelic is an asset. In addition, these businesses also provide an above average proportion that regard Gaelic as an asset - 88% of respondents from these sectors regard Gaelic as an asset compared to 69% overall.

<sup>16</sup> Note: these findings are not statistically significant as they have not been subject to statistical tests given the small sample sizes for some sectors, however, the issues emerging are worth reflecting on.

- **Second**, other sectors that show higher than average proportions of business regarding Gaelic as an asset include: heritage, learning/education, and businesses involved in supporting community development – with 80%, 88% and 100% respectively (again compared with 69% overall) – albeit with relatively small numbers of survey respondents in each.
- **Third**, it is worth noting some of the sectors that exhibit a lower than average proportion of businesses that regard the use of Gaelic as an asset – and this includes food and drink and tourism, as well as manufacturing/production sector businesses, and retail/wholesale.

These general findings should of course recognise that there are key examples of businesses in these sectors who do use and regard Gaelic as an asset, but (both proportionately and in absolute number) the business survey results show that **the greater representation of businesses that regard Gaelic as an asset reside within the creative industries, heritage, education/learning and community sectors.**

The responses from community organisations about the value of Gaelic (as an asset) overwhelmingly shows that Gaelic is recognised as adding real value, with more than 80% responding positively to the question (Table 3.16).

**TABLE 3.16: Overall, do you think that Gaelic - and your association with it – adds real value (and is an asset) to your community organisation?**

	Response Percent	Response Count
Yes	84.4%	38
No	11.1%	5
Don't know	4.4%	2

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=45)

Analysing these community organisations in terms of the ‘sectors’ within which they work, supports the findings from the business survey, with the **most commonly represented sectors within the 84% of community organisations who state that Gaelic adds real value to their organisation being: creative industries (especially music), alongside Gaelic learning and other education, as well as community development and heritage organisations.**

### Types of Benefits Gaelic Provides to Business

With almost 70% of business survey respondents stating that Gaelic is an asset, it is useful to assess the specific types of benefits that result from the use of Gaelic for businesses and enterprises.

Table 3.17 (which was only asked of those businesses and enterprises that said Gaelic was an asset) summarises the responses from businesses to specific questions about the types of benefits from using Gaelic.

The results show there are some aspects where businesses feel the use of Gaelic provides clear benefits.

First, more than half of respondents described the following three aspects as **major benefits** from using Gaelic as an asset:

- **Enhances the distinctiveness/uniqueness of products/services** (63%).
- **Enhances customer perceptions of authenticity and provenance of products/services** (55%).
- **Increases the appeal of products/services to your target markets** (54%).

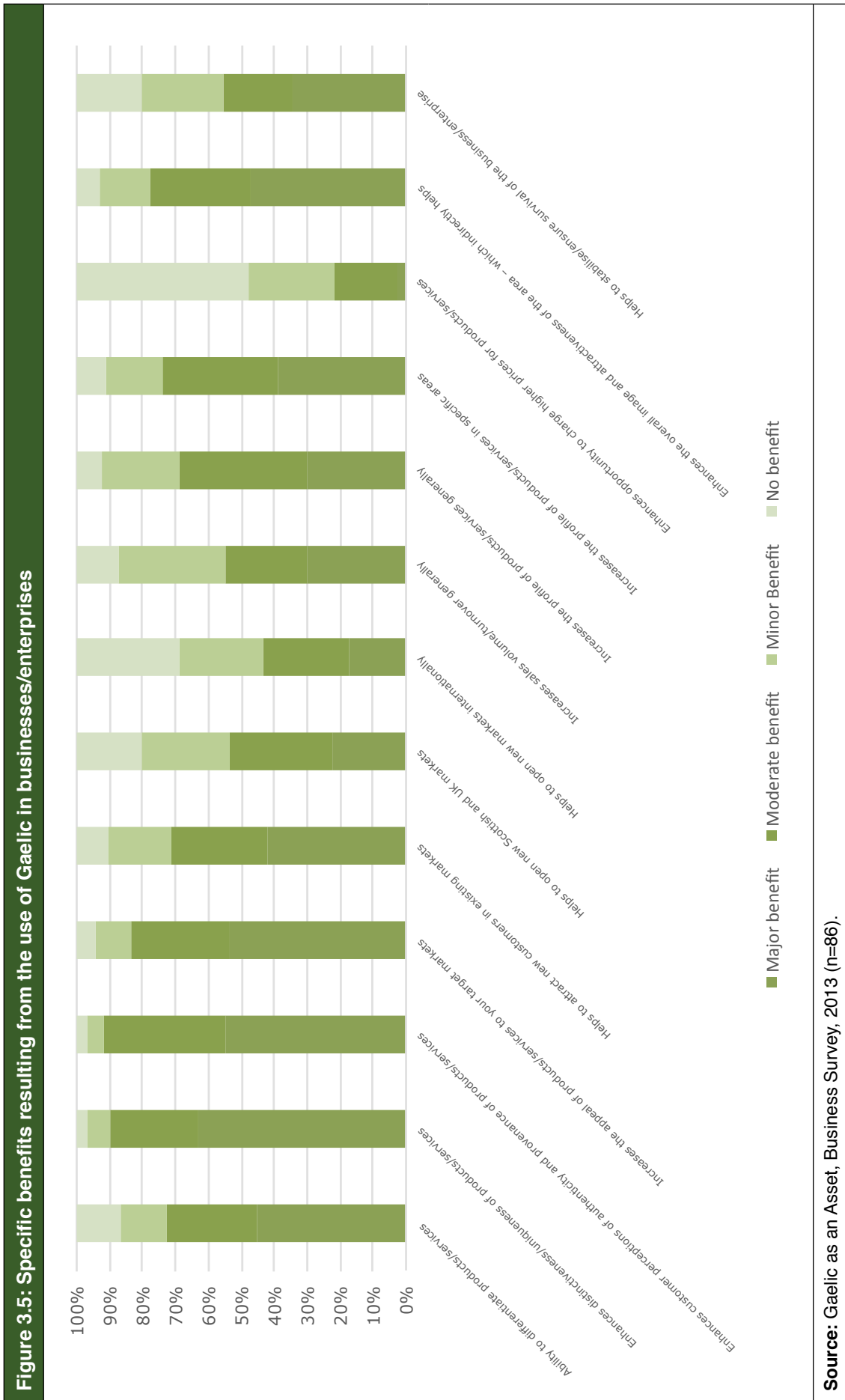
Second, the **major and moderate benefit categories** can be taken together (Figure 3.5 summarises these findings in a bar chart style that allows the proportions identifying benefits as major or moderate to be visually represented together).

This shows that seven aspects (the three above plus four additional aspects) have more than 70% of businesses describing them as major or moderate benefits of using Gaelic:

- **Enhances customer perceptions of authenticity and provenance of products/services** (92%).
- **Enhances the distinctiveness/uniqueness of products/services** (90%).
- **Increases the appeal of products/services to your target markets** (83%).
- **Enhances the overall image and attractiveness of the area – which indirectly helps your business** (78%).
- **Increases the profile of products/services in specific areas** (74%).
- **Ability to differentiate products/services from that of others (non-Gaelic)** (73%).
- **Helps to attract new customers in existing markets** (71%).

Reflecting on the top three benefits (in terms of the proportion of respondents that identified them as major benefits) – enhancing distinctiveness/uniqueness, enhancing perceptions of authenticity and provenance and increasing appeal to target markets, the businesses sectors most commonly represented amongst the respondents that stated these were major benefits can be identified:

- The type of businesses for which ‘Enhances the distinctiveness/uniqueness of products/services’ is a major benefit represent the main sectors identified earlier in this section – with ‘**community**’ and ‘**creative industries**’ having the highest proportions of businesses and organisations regarding it as a major benefit.
- The sectors reporting the highest proportion of respondents for whom ‘Enhances customer perceptions of authenticity and provenance of products/services’ is a major benefit are **community, creative industries, and learning and education**.
- Finally, for ‘increases the appeal of products/services to your target markets’ the sectors with the highest proportions of businesses regarding this as a major benefit are **community, creative industries, and learning and education**.





**TABLE 3.17: What specific benefits result from the use of Gaelic in your business/enterprise?**

	Major benefit	Moderate benefit	Minor benefit	No benefit	Response Count
Ability to differentiate products/services from that of others (non-Gaelic)	<b>45%</b>	<b>28%</b>	14%	13%	84
Enhances the distinctiveness/uniqueness of products/services	<b>63%</b>	<b>27%</b>	7%	4%	86
Enhances customer perceptions of authenticity and provenance of products/services	<b>55%</b>	<b>37%</b>	5%	4%	86
Increases the appeal of products/services to your target markets	<b>54%</b>	<b>30%</b>	11%	6%	84
Helps to attract new customers in existing markets	<b>42%</b>	<b>29%</b>	19%	10%	83
Helps to open new Scottish and UK markets	23%	31%	26%	20%	80
Helps to open new markets internationally	17%	26%	26%	31%	81
Increases sales volume/turnover generally	30%	25%	33%	13%	80
Increases the profile of products/services generally	30%	39%	23%	8%	77
Increases the profile of products/services in specific areas	<b>39%</b>	<b>35%</b>	17%	9%	77
Enhances opportunity to charge higher prices for products/services	3%	19%	27%	52%	79
Enhances the overall image and attractiveness of the area – which indirectly helps your business	<b>47%</b>	<b>31%</b>	15%	7%	85
Helps to stabilise/ensure survival of the business/enterprise	35%	21%	25%	20%	81

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=86).

*Note: those categories in green are those where more than 50% of respondents stated they were a major benefit.*

*Those categories in bold are those where more than 70% said they were a major or moderate benefit.*

Evidence from the interviews and focus groups supports the above findings – emphasising that the **main ways in which Gaelic is an asset for businesses and community organisations relate to issues around authenticity, distinctiveness, uniqueness, differentiation, and provenance**. The examples below also indicate the types of business that report these benefits from using Gaelic. [NB: emphasis has been added by the research team by underlining relevant words]:

*“The use of Gaelic adds requisite authenticity to our Trust’s activities”.*

[**Heritage** sector organisation]

*“...recognise that the inclusion of some Gaelic in my promotional material could enhance the authenticity of my work”.* [**Crafts** business]

*“There are no other [of our type of business] staffed by Gaelic speaking [professional staff] who can offer a service through the medium of Gaelic, so this is our niche in the market”.* [**Creative industry** business]

*“It is a distinctive part of our identity that differentiates us from the competition and other businesses in our field”. [Arts Centre/Hub]*

*“Gaelic is not an essential part or requirement of our business however it is an asset in selling our location/a holiday in a uniquely different part of the world”. [Accommodation provider business]*

*“We see Gaelic as a distinctive part of the village and a way of recognising our history as well as a way of attracting visitors”. [Social enterprise]*

*“It establishes credibility of belonging to island rather than mainland and reinforces cultural heritage and history”. [Crafts business]*

*“Our guests are not Gaelic speakers, but some of our staff are, and the guests are often interested in hearing Gaelic spoken”. [Hotel and restaurant business]*

*“People like to see that the name of [the type of product we produce] is in Gaelic, they don’t necessarily understand the language”. [Manufacturer]*

*“For marketing purposes. e.g. Some guests like to hear Gaelic spoken”. [Hotel and restaurant business]*

*“Locals, especially the older ones, like to use their native language. Visitors find it interesting to hear the language being used”. [Retail business]*

*“It plays a part in the overall experience that people expect to find here, along with walking and wildlife”. [Accommodation provider business]*

In contrast, **other respondents reflected on the position of Gaelic** compared to other elements of their specific business or the wider sector within which they operate, **and do not regard Gaelic as providing added value or working as an asset** for them.

This includes businesses that either **recognise the potential benefits, but do not feel they are relevant to their business**, or those that recognise (or are involved in) some activities – e.g. signage – but **do not feel it provides any benefits to the business** supporting the findings (Reference Economic Consultants, 2011) mentioned in Section 2 [NB: emphasis has been added by the research team by underlining relevant words]:

*“I can see that Gaelic might be utilised as an asset to businesses in the tourist and traditional music industry, but for [our business] I don’t think it would make any difference. Customer service is what makes the difference, in our opinion, and most Gaelic speakers can also speak English”.*

*“More or less irrelevant to our customer base. Some brand names use Gaelic words as a method of signifying provenance, but very minor role”.*

*“Gaelic is only used for all the signage within the main building, Number of people in [this area] that only read Gaelic is minimal. There has been no reaction to the signage either one way or another”.*

*“Signage is bilingual but it has no direct bearings on our ability to deliver our services”.*

A small minority do not feel that there is a role for Gaelic in their business or industry, due to the **dominance of other languages**, especially in terms of communication nationally and internationally. Others note that **other assets and characteristics of the business are more important**, or simply do not see the relevance of Gaelic to their business:

*“I do not believe that our customers find it significant in this part of the Highlands. I believe our Brand and our products and services are more important”.*

*“Of no relevance or applicability to the business”.*

*“All of our work with our clients is carried out in English. Our promotion material does not necessitate any Gaelic content”.*

*“I can’t imagine why it would be helpful for businesses that have a widespread geographical focus...”*

Finally, (referring back to the findings presented in Table 3.17) it is important to reflect on the two aspects that the **lowest number of respondents identified as being a major or moderate benefit** from using Gaelic:

- Enhances opportunity to charge higher prices for products/services (only 3% describe this as a major benefit, and taking major and moderate together - 22%). Of the 22%, these are all businesses and self-employed individuals involved in the **arts, crafts, creative and cultural industries**.
- Helps to open new markets internationally (17% describe this as a major benefit, increasing to 43% when major and moderate are taken together).

In terms of the opportunity to charge higher prices, the focus group and interview findings support this survey result – with business/enterprise representatives noting that they do not see the use of Gaelic (in and of itself) as an opportunity to charge higher prices, with some clearly stating that to do so (charge a premium for Gaelic products/services) would be something they would actively seek to avoid, given their desire to support the regeneration and normalisation of the Gaelic language. In addition to which, some businesses do not believe their market would accept higher prices. This does not mean that some products that feature Gaelic are not able to charge a price premium more than the consultation evidence suggests this relates to the provenance and quality of the products (e.g. food and drink) rather than the use of Gaelic itself. The key exception to this is whisky – where Gaelic is clearly used at the premium end of the market – the role of Gaelic for this specific sector is considered in the next Section of the report, which looks at key examples of the economic and social value of Gaelic as an asset.

### Key Findings – Section 3

- The research has highlighted the **scale of the use of Gaelic** by businesses (more than 60% of those surveyed use Gaelic as a key element), the **value that using Gaelic can add** to businesses and community organisations (70% of businesses surveyed regard Gaelic as an asset to their business), and the **types of benefits that using Gaelic provides** to businesses.
- The three aspects that are the most common **major benefits** for businesses from using Gaelic as an asset are that it:
  - **Enhances the distinctiveness/uniqueness of products/services** (63%).
  - **Enhances customer perceptions of authenticity and provenance of products/services** (55%).
  - **Increases the appeal of products/services to your target markets** (54%).
- More than half the business (60%) and 85% of community groups surveyed stated that **Gaelic is used, or features, as a key element of their main activities**, products or services.
- Almost two-thirds of businesses consulted describe Gaelic as moderately, very, or critically important, and more than half the community organisations stated that Gaelic is critically important.
- **Businesses that identified Gaelic as being *critically important* are most commonly in creative industries sectors** (e.g. music, art, design, performance, theatre, media, publishing, digital/ICT). Other businesses that identify Gaelic as critically important include those in the **heritage and learning sectors**.
- Almost **70% of businesses consulted said that Gaelic is an asset** to their main business/enterprise activity, with the greater representation of these being in **creative industries, heritage, education/learning and community sectors**.
- Commonly represented sectors within the **84% of community organisations who state that Gaelic adds real value to their organisation** are **creative industries** (especially music), alongside Gaelic **learning and other education**, as well as community and heritage organisations.

### Prìomh Thoraidhean – Roinn 3

- Tha toradh an rannsachaidh a' leigeil cuideam air **sgèile cleachdaidh na Gàidhlig** le gnothachasan (còrr is 60% de luchd-freagairt a' cleachdadh na Gàidhlig mar phrìomh eileamaid), **luach a tha cleachdadh na Gàidhlig a' cur ri buidhnean** gnothachais is coimhearsnachd (70% de ghnòthachasan san t-suirbhidh a' faicinn a' Ghàidhlig mar so-mhaoin dhan cuid gnothachais), agus **an seòrsa buannachd a tha cleachdadh na Gàidhlig a' tabhann** do ghnòthachasan.
- 'S iad na trì feartan as cumanta a tha nam **prìomh bhuannachdan** do ghnòthachasan bho bhith a' cleachdadh na Gàidhlig mar so-mhaoin gu bheil i a':
  - **cur ri cho sònraichte/àraid 's a tha stuthan is seirbheisean (63%)**
  - **cur ri aithneanas a thaobh cinnteachd is tùs nan stuthan/seirbheisean (55%)**
  - **meudachadh agartais a thaobh stuthan/sheirbheisean do mhargaidhean air targaid (54%)**
- Thuit còrr is leth de ghnòthachasan (60%) agus 85% de bhuidhnean coimhearsnachd gun robh **Gàidhlig air a cleachdadh, no a' nochdadh, mar phrìomh eileamaid de phrìomh gnìomhan**, stuthan no sheirbheisean na buidhne.
- Mhìnich faisg air dà-thrian ris an deach co-chomhairle a dhèanamh gun robh a' Ghàidhlig glè chudromach, fìor chudromach no riatanach, agus thuit còrr is leth de na buidhnean coimhearsnachd gun robh a' Ghàidhlig riatanach.
- **Tha na gnothachasan a chomharraich a' Ghàidhlig mar riatanach sa chumantas anns na raointean de gnìomhachsan cruthachail** (m.e. ceòl, ealain, dealbhadh, luchd-cluiche, taighean-cluiche, na meadhanan, foillseachadh, ditigiteachd/ICT). Tha na buidhnean eile a tha a' comharrachadh na Gàidhlig mar riatanach a' gabhail a-steach feadhainn a th' anns na **raointean dualchais is ionnsachaidh**.
- Thuit faisg air **70% de na gnothachasan sa cho-chomhairleachaidh gu bheil a' Ghàidhlig na so-mhaoin** dhan phrìomh gnìomh gnothachais/iomairt aca, leis an riochdachadh a b' àirde dhiubh seo anns na raointean gnìomhachais cruthachail, foghlaim/ionnsachaidh agus coimhearsnachd.
- Tha na raointean a tha sa chumantas a' nochdadh anns an **84% de bhuidhnean coimhearsnachd a tha a' cur an cèill gu bheil a' Ghàidhlig a' cur fìor luach ris a' bhuidheann** a' gabhail a-steach **gnìomhachasan cruthachail** (gu h-àraid ceòl). cho math ri **ionnsachadh Gàidhlig is foghlam eile**, agus leasachadh **coimhearsnachd** is buidhnean **dualchais**.

#### 4. ROLE OF GAELIC AS AN ECONOMIC AND SOCIAL ASSET: KEY EXAMPLES

This section of the report provides a range of specific case study examples of the role of Gaelic for businesses, social enterprises and community groups – highlighting examples where Gaelic is an asset and adds value to the business, enterprise, or organisation.

The case study examples include coverage of the main **types** of business and organisation where Gaelic is an asset (through presenting individual case studies of businesses and organisations), as well as some of the key **sectors** where Gaelic is recognised by businesses and enterprises as adding value.

First, the individual case studies are presented (in alphabetical order) and these include:

Case Study	Type/Sector
An Lanntair, Stornoway	Arts Centre (Creative Industries)
Aros Visitor Centre and Arts Centre, Skye	Arts Centre and Visitor Centre (Creative Industries/Tourism)
Celtic Connections	Festivals, Music (Creative Industries/Tourism)
Facal, Sutherland	Gaelic transcription and translation(Creative Industries)
Fèisean nan Gàidheal and Blas	Festivals, Music (Creative Industries)
HebCelt Festival, Stornoway	Festivals, Music (Creative Industries/Tourism)
Media nan Eilean (mneTV)	Media (Creative Industries)
Port Charlotte Hotel, Islay	Hotel (Tourism)
Praban na Linne, Isle of Skye	Whisky (Food and Drink)
Sabhal Mòr Ostaig, Isle of Skye	Education (Education)
Sealgar, Isle of Lewis	IT Services (Creative Industries)
Seallam Visitor Centre, Northton, Harris	Genealogy Service (Heritage / Tourism)
Stòras Uibhist	Community Landowner (Community)
Taigh Chearsabhagh, North Uist	Arts Centre (Creative Industries)

Second, a range of sector overviews are presented – providing wider reflections on the role of Gaelic in specific sectors. This includes: Gaelic Cultural Hubs, the Gaelic Publishing Sector, the Gaelic Media Sector, Gaelic and Scotch Whisky, and the Tourism Sector.

## An Lanntair, Stornoway

(For more information: <http://www.lanntair.com/>)

An Lanntair is an Arts Centre incorporating visual & performing arts, an education programme, cinema, retail, bar and restaurant. It employs 30 full-time and 18 part-time or seasonal staff, receives foundation funding from Creative Scotland and annual support from the local authority, and has a turnover of just over £1 million.

An Lanntair staff believe Gaelic is a very important aspect of their work and they use **bilingual signage**, and **Gaelic at the front desk**, in exhibitions, in specific performances, and through Gaelic products for sale. **An Lanntair also employ Gaelic on some of their external advertising believing that it is a 'major benefit'** in a whole range of ways, from **differentiating** what they offer, to **enhancing** the customer's feelings of their **authenticity** in running an Arts Centre in such a profoundly Gaelic location.

In their view **Gaelic in the community was a critical factor** in the setting up of An Lanntair, it being and remaining a part of their original mission to represent, promote and celebrate Gaelic culture. They believe **the presence of Gaelic in their work offers benefits** and opportunities for audiences, performers, artists, consumers and the education sector. They hope it might be feasible to **expand** what can be done through the medium of Gaelic in future: possibly through **the use of new digital or other platforms** making archive and source material, visual and audio, more available and accessible to a wider audience.

At the time of this research, one of the current exhibitions at An Lanntair was of a peat stack which was surrounded by, and celebrated, Gaelic vocabulary and artefacts associated with peat cutting – an authentic part of the Hebridean landscape. Through this, the aim was to **celebrate and promote Gaelic culture** and look at **new ways to re-interpret it**.

Although Gaelic was embedded in this – the walls being covered with translations of peat cutting vocabulary their view was that "*A museum would never have thought of doing this in a hundred years*" and they believe that **this approach attracted visitors due to its authenticity** and grounding within living tradition. As an arts centre they believe that one of their roles is to push the boundaries of the debate, and that used in this way **Gaelic is an asset in terms of attracting visitors**.

According to An Lanntair, Gaelic is now seen as a much more professional part of arts and culture than might have been the case previously.

## Aros Visitor Centre and Arts Centre, Skye

(For more information <http://www.aros.co.uk>)

Aros is a cultural centre in Portree, showing films daily and shows all year round. It is a private company employing 31 staff all year round and up to 6 seasonal staff in the summer. Aros received project funding from Creative Scotland in 2013-14, and has a turnover of £1.2m per annum with their market being perhaps 40 percent Skye and Lochalsh, 40 percent visitors from elsewhere in the UK and then 20 percent internationally.

Eight of the 31 full time staff are indigenous fluent Gaelic speakers, and another 14 are able to converse to some degree in Gaelic. To help staff understand and improve their Gaelic Aros has provided courses for the last two years – ten of the staff have a direct remit to engage with Gaelic directly. **Aros encourages the use of Gaelic** where possible for internal communications, and some of the internal meetings are held in Gaelic – internal meetings between local board members are in Gaelic. Likewise for external communications, where this is possible – in engaging with the Arts community and the Gaelic community Gaelic is used – **seeing it as a principled form of engagement and also in terms of marketing and promotion**. Where possible, **use of bilingual material is maximised**. Examples are tea-towels with the 18 ‘Gaelic’ trees with the characters in Gaelic alphabet. There is also a Gaelic trail outside the centre plus products associated with that. At present Aros are expanding this area – and are now offering an iPhone cover with Gaelic on it as one new example of bilingual products.

**In terms of turnover, Aros believe they would not exist without Gaelic and its associated culture**, having been set up with the specific view of telling the story of Skye. This initial exhibition ran for 5 years thus allowing the development of its second phase – which was a purpose built theatre. **In terms of exhibitions, Gaelic remains the driving theme with its history and culture part of it**. Aros believes that **fifty percent of its turnover comes from cultural and Gaelic associated activities**.

Aros believes its activity in the Gaelic field also has knock-on effects and **helps others wanting to set up a business** such as local graphic designers. It **also provides demand further afield** by ordering goods such as Gaelic labelled soap from a business in Inverness thus widening the national impact of their activities.

Aros believe the model of its business is very close to a social enterprise with Aros now being amongst the biggest contributors to the arts in the highlands. Whatever is generated goes back to the community on the social side – for instance in its provision of music tuition and dance to schools. **Aros believe that the reason it gets such a high proportion of people through the door is because customers identify with Aros**.

*“Although it’s really difficult to give exact numbers, of the 40 percent of our market that are local people, 20 percent would be engaged because of what we do for Gaelic. That’s worth over £50,000 over a year... Gaelic has a huge effect on the wider community in terms of locals identifying with this business”.*



## Gaelic at Celtic Connections

Glasgow hosts the annual Celtic Connections festival which continues to grow and is now of international importance. An annual folk, roots and world music festival, Celtic Connections celebrates Celtic music and its connections to cultures across the globe, featuring more than 300 events across multiple genres of music.

In 2008, in-depth research was carried out of **the impact of Gaelic on the festival**.

For that year's festival, approximately 120,000 tickets were sold bringing in an estimated income of £6million to the city. **Within this there was a high visibility and involvement of Gaelic related artists, with a substantial financial impact recorded.** Information from Celtic Connections administration allowed the classification of **40 concerts/events which could be either categorised as 'Gaelic identified'** or where a recognisable Gaelic input could be discerned.

After discussions with Celtic Connections staff, 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 £120,000 – 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 eighth – 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 £750,000 to the Glasgow economy in 2008.** 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.

At time of writing detailed financial figures have not yet been released of Gaelic aspects of 2014 Celtic Connections, however, **the amount of discernible concerts featuring Gaelic has remained high** at over 30, **and this year Gaelic has played a more visible part**, with an identified Gaelic 'stream' to the festival, and **a larger number of allied events** promoting language and Gaelic song learning.

This is a very strong indication of the **role that Gaelic was playing as a social and economic asset** in a City where less than 2% of the population speaks, reads and writes Gaelic according to the most recent Census figures.

## Facal

(For more information see: <http://www.facal.co.uk>)

Facal language services is a two person business based in Strathnaver, Sutherland. Most of its work concerns transcriptions and translation, plus they it is involved in tuition and other projects to do with Gaelic language and heritage, such as a dictionary of the local Gaelic dialect, local language plans, recording answerphone messages in Gaelic, and providing simultaneous translation services.

Sixty percent of its work is transcription, and the remainder is translation. It also delivers services to public bodies.

Organisations for whom it has completed projects over recent years include:

- Highlands and Islands Enterprise.
- The National Library of Scotland.
- Scottish Natural Heritage.
- The Forestry Commission.

Facal also deliver tuition locally and further afield.

All of **Facal's** work is related to Gaelic, and the company's owner notes that **Gaelic is at the core of what they do**.

Choosing a Gaelic business name **Facal** ('word') was seen as **integral to the work that the business carries out, illustrating its nature from the outset**, and also giving insight into the nature of the business's activity.

For the owner, **their relation to the local Gaelic speaking community is crucial** and they also believe that their work in providing local tuition may help transform the community use of Gaelic in a positive way.

Staff use Gaelic within the business for communication, and they also top and tail external e-mails where it is felt appropriate. Facal has also used **Gaelic promotional material** in the past to increase the visibility of the business, but at the moment are working at full capacity.

Although working in a geographic area where the use of Gaelic has declined, the owner believes Gaelic provides a sound basis for activity. As one of the partners said: *"I've moved from the Western Isles to here – it shows you can sustain yourself"*.

## Fèisean nan Gàidheal (FnG) and Blas

(For more info: <http://www.feisean.org> and <http://www.blas-festival.com>)

Currently there are 44 active fèisean (non-competitive Gaelic music festivals), with over 15 full-time staff working between the central organisation and Fèis Rois. FnG and Blas receive foundation funding from Creative Scotland. According to recent research for HIE, through the activities of the fèisean, a total of 107 full time equivalent posts have been created (encompassing FnG, Fèis Rois and the tutors employed). In terms of geographical coverage the only areas of the mainland and the Western Isles not covered are South Lanarkshire, the Lothians outwith Edinburgh, Clackmannanshire, Dundee and Fife.

**FnG believes its activities have always been a vehicle for promoting the language rather than the music**, although *'it is the music that attracts the people to the fèisean'*. Although it does not see its job as teaching Gaelic, it believes that every child who comes to a fèis should experience the language.

**FnG see Gaelic as the component that distinguishes the fèisean from other 'traditional' music tuition programmes**, which still exist in places like Aberdeen and Edinburgh, with **Gaelic being the added component that both makes the festivals authentic**, and **provides the element that makes them special**. This being the case, FnG believes it adds Gaelic value to the experience of the 6,000 plus students who take part every year, and the audience – now in the range of almost 8,000 people annually.

As well as being active within the fèisean themselves, young musicians and those linked to the fèisean are encouraged to become involved in the allied annual Blas festival. This is a separate initiative, run by FnG but also funded by The Highland Council. This has a much more outward looking focus, and does **attract some international visitors**.

Like the fèisean the annual **Blas festival has a profoundly Gaelic focus**, with artists taking part also obliged to use Gaelic from the stage, in introducing their acts and in other aspects of their involvement. In 2012 almost 8,000 people came to the Blas events, which on principle, are held within communities, rather than consisting of big money making single events. *"To put on a music event in the highlands to make money you would just put it in a big tent and charge, but the ethos of this is different – it is to take events out to communities"*.

The performers are a mixture – some young performers directly linked to FnG, and others are **quality Gaelic artists already performing for a living**. In the organisation and performance of the Blas festival, strong links are always made to the young people within the fèis movement, and also to organisations such as the Plockton-based National Centre of Excellence in Traditional Music, and the Promoters Arts network. One aim is to give young people already involved in the work of the fèisean an opportunity to perform alongside their preferred musicians and acts, thus **further developing their experience** in the music and arts field.

Audience feedback suggests that perhaps 80% of the Blas festival's audience regularly acknowledge **the enhancement added by Gaelic to the festivals**.

Although the Blas events have a turnover approaching a quarter of a million pounds (£230,000), the organisers suggest that it is hard to specifically attribute a percentage of this to Gaelic since *"if we were asked to run a festival then we wouldn't ever do it without Gaelic – so it is 100% from that point of view. You could put on a non-Gaelic event but we wouldn't be interested in running it"*.

The incentive for FnG to become involved in the Blas activities was both that there would be a clear Gaelic element, but also that young people would have the chance to **further develop the work and experience** they had gained within the fèisean themselves.

The issue of skills development continues to be an important one for FnG, with both Gaelic training for tutors being encouraged and expected, but also training provided for young people to take part in Cèilidh trails – of which there are currently seven. A fortnights training provision is provided for this in Plockton with one-to-one help also given so that those taking part can then go touring in their local areas, using Gaelic in their sets. **Fèis Rois similarly undertake a ‘national cèilidh trail’ even taking Gaelic to the Cambridge Folk Festival.**

Further arts training is given by the FnG’s Gaelic drama theatre education group which helps develop drama in Gaelic schools every year and includes a Gaelic Summer School. FnG has also set up what it calls Fèisgoil, a Gaelic education service where FnG builds upon the work it has done in promoting Gaelic music in schools, by helping provide tutors in non-GME schools, who, being native Gaelic speakers help with the Gaelic Learners in the Primary School initiative (GLPS). This is often done with the inclusion of a song or bit of drama, and is welcomed by local authorities.

**In terms of using Gaelic as an asset, FnG believes it is a profoundly Gaelic organisation that both brings young people to the language, through the culture, but also then takes back a constantly enriched version of a living tradition, into the communities themselves, thus helping the attractiveness and cohesion of the Gaelic tradition within Scotland’s arts and cultural fields.**

## The HebCelt Festival, Stornoway

(For more information: <http://www.hebcelfest.com>)

The HebCelt festival is an annual music event held in July and which is based in Stornoway with associated events also held outwith the town. It currently employs one person full time, with many more staff on a seasonal basis – particularly as the festival approaches and takes place resulting in the equivalent of approximately a dozen full time staff for a fortnight.

The festival's main funders are Creative Scotland, together with the local authority and Highlands and Islands Enterprise.

According to the organiser, the festival was established to promote major music acts in Stornoway alongside local talent giving them a major platform. It was set up as a focus for the community rather than with a direct tourism remit, **however it has become increasingly popular with tourists**. At present the majority of attendees are in the main individuals with some previous link to the area, who often stay with family and friends.

In the view of the organisers **it has positively impacted on the range and breadth of employment now available in the area**. They cite a local music studio that continues to be busy through the year. In addition, according to many of the influential figures in the Gaelic music scene – Julie Fowlis, Alasdair White of the Battlefield Band, Norrie Maclver in Manran – the festival was very influential for their future careers.

**From the beginning Gaelic was always seen as an integral part of the event**, given its location. *“It's great to have Gaelic in the mainstream – and it has given local Gaelic bands a focus with the bigger bands. This was a big consideration when we set it up”*. The market is almost 50% local, approximately 10% the rest of the Highlands and Islands, and almost 25% the rest of Scotland.

The staff tend to use Gaelic for internal communication and **where possible and appropriate they tend to use it in communication with their clients**. *“We do this to keep people aware of its existence. The language is part of the place”*.

Over the last period **Gaelic has increasingly been used in terms of promotion**, with Gaelic **on the website** and in **social media**, in the **programme booklet** and on the headings of the **posters**. On the website there is a Gaelic section about the language where common Gaelic phrases are explained. Gaelic is seen as one of the USPs (unique selling points) of the festival locally. HebCelt believe language and culture are part of the uniqueness that it promotes. **HebCelt believe it (Gaelic) may help with authenticity** – although it doesn't really differentiate the festival since it is the main one in the area.

## Media nan Eilean (mneTV)

Media nan Eilean (mneTV) is Scotland's biggest producer of sport programmes and are the 15th largest independent TV production company outside of London, with over 100 series names to their credit. The company has just celebrated its twentieth year of work within the Scottish independent television production sector, having been established in 1989. With a full-time staff of 25, mneTV is around the seventieth largest in the UK sector, the 15th largest outside of London, and the second largest indigenous company in Scotland.

Although mneTV works with all Scottish broadcasters, the majority of its work currently is for BBC ALBA, and it produces between fifty and sixty Outside Broadcasts in Sport, to cover Scottish Premier League Football, International Women's Football, Club Rugby, Scottish First Division League and Cup Football, and Shinty. The company also produces CLUBTV for BBC ALBA – a monthly TV exclusive magazine show on Celtic and Rangers Football Clubs, presented from studios at STV.

The firm's activities are a **clear example of a business using Gaelic as an asset – their experience and knowledge of the Gaelic world**, together with their staff and crew (a notable number of whom are Gaelic speakers) **means they can compete on quality terms** with any other production company in the field of Gaelic broadcasting and media.

In entertainment, mneTV produces coverage of International Sheepdog Trials and Country Music Festivals, in addition to coverage of documentary series, and infotainment shows. Production work across all genres is supported by three camera units and four edit suites within the company premises.

An example of the type of asset that Gaelic broadcasting in sport is to Scotland can be seen in relation to the present coverage of pro-12 Rugby in Scotland, and also the coverage of Scottish football. There is undoubtedly a knock-on impact in the world of sport due to the exposure on BBC ALBA of the work of mneTV. Sports commentators have remarked on the positive effect that this coverage is having on Rugby teams such as the Glasgow Warriors – now filling their stadiums to a greater extent than before. Likewise coverage of clubs such as Motherwell and Ross County allows towns such as Dingwall and elsewhere to feature on TV and gain through national exposure and profile – as a result of the coverage on the Gaelic channel from mneTV and others.

This, according to mneTV, also has a general knock-on effect in terms of how Gaelic is generally perceived by the public: *“By dint of covering mainstream sport, there is a cultural value in people for the first time hearing the language, being in touching distance of the language, and having some working knowledge of it”*.

General surveys of viewers of BBC ALBA show that while Gaelic speakers appreciate it enormously non-Gaels have also been brought on board and therefore engage with the language in a way that was not the case previously – as can be evidenced through the viewing figures, now regularly above 750,000 per week.

## Port Charlotte Hotel, Islay

(For more information see: <http://www.portcharlottehotel.co.uk>)

The Port Charlotte Hotel is a venue on Islay that has become increasingly connected to Gaelic music and culture. It is a hotel employing 19 full time staff, which increases into 30 or so in the summer. For the hotel, around two-thirds of the clientele are from the UK and the rest are international, with the mainstays being Scandinavian.

The Gaelic aspects of the hotel's activity include:

- **Gaelic music nights** for tour buses.
- **Music and Gaelic song** on a twice-weekly basis.
- **The Islay Sessions** – held annually featuring local, and mainland music, with a strong Gaelic component.
- **Increasing bilingual signage**, including a new large sign on the hotel's gable end.

The hotel has increasingly been building up its profile as a venue for Gaelic music, and in particular for the *Islay Sessions* during the second week in November, during which time a series of local and mainland folk and also Gaelic bands and singers are prominently showcased.

Compared to its earlier history, there is now **more stress on a Gaelic image for the hotel**, with a large bilingual sign for the Hotel, featuring prominently on the building's gable end. In the view of the proprietor **this is an important statement to make to the local community and to tourists** in general. Although this is primarily done on principle, he believes that **this gives the hotel part of its 'uniqueness' and thus creates a draw**. In day-to-day activity Gaelic is used internally by the 15 percent of staff who are fluent.

Although the proprietor believes that the biggest draw to the island is the collection of local whisky distilleries, he is of the view that **local Gaelic culture is a key element** of what tourists are also seeking. **It thus enhances provenance and local authenticity for the hotel itself.**

The benefits that are derived from using Gaelic include an acknowledgment of the activity by the local community, and **Gaelic's impact as a marketing tool** (although it was not primarily designed as that). He believes that the use of bilingual signage helps in **raising the prominence of the language in the community and also to some extent, the activities of the hotel**. *"Visitors expect Gaelic here, and they hope to see it. This helps convince people with it, they should try to keep it"*.

## Praban na Linne

(For more information, see: <http://www.gaelicwhisky.com>)

Praban na Linne is a whisky retailer on Eilean Iarmain, on the Isle of Skye. Established in 1976 by Sir Iain Noble it has been a key element of the continuing developments around Eilean Iarmain since this period. Praban na Linne has one shop on the premises, although the bulk of its product is exported.

Praban na Linne employs 3 staff plus the director and has 1 part-timer on a seasonal basis. Its markets are 10% local (retail from the shop) 10% elsewhere in the Highlands and Islands, 10% elsewhere in Scotland and 70% internationally. In terms of international markets, it sells 20% to Canada, then in diminishing order to France, Holland, Germany, Taiwan and the US.

**Gaelic is used on labelling and is spoken in the office** (Praban na Linne might be translated as ‘the shebeen/drinking den of the firth/straits’). Gaelic was a huge influence in the creation of the company. In terms of external communications, with local companies or organisations, staff also try to use it, seeing it as the **core of their business** in the area.

Praban na Linne **uses Gaelic in promoting the business** – on leaflets, *“even if everyone doesn’t understand”* as the company believe it possibly **helps create a niche market**, and *“gives a flavour”* of the type of business Praban na Linne is. Gaelic is used on the website, the letterhead uses Praban na Linne, and Gaelic greetings are used on the end of e-mails.

**Praban na Linne believes that the Gaelic labelling and symbolic use of Gaelic contributes most to its international market** – it makes them seem different and “sets them apart”. Using Gaelic therefore enhances **provenance and authenticity** internationally. Praban na Linne also believes that **its own use of Gaelic has enhanced the recognition of Gaelic within the local community**, and in fact has made other companies want to emulate it.

For Praban na Linne, being immersed in Gaelic creates a commitment to it. This also, it believes, helps **deepen the language’s use locally** – Praban na Linne believes Gaelic is now used in this area of Skye to a far greater extent than it is elsewhere including a resurgence within families in the community locally with children being sent to Gaelic Medium Education. *“Even parents who previously didn’t use their Gaelic too often, now feel they ‘should’ if their child is in Gaelic Medium”.*

**In terms of the importance of Gaelic to the current success of the business, Praban na Linne would rank/rate this very highly.** It believes that Gaelic has been responsible for perhaps around one-fifth of the turnover of the business.



## Sabhal Mòr Ostaig

(For more information: <http://www.smo.uhi.ac.uk>)

The development of Sabhal Mòr Ostaig (SMO) is instructive in terms of how an organisation originally seen as a cultural centre based on derelict property – the big barn of Ostaig – and aimed at enabling short courses and a library, has taken wings and grown into Skye's third largest employer. Originating in 1973, the first full time courses – an HND in Business studies and commerce took place in 1983.

Today it is the National Centre for Gaelic language and culture in Scotland and part of the University of the Highlands and Islands with its core business Education, Teaching and Learning plus research, **together with culture, arts and economic development**. SMO has approximately 125 staff on campus, the majority of whom are female, with an estimated income impact of over £3million per annum on Skye itself. It is also currently at the heart of proposals to create a village at Kilbeg adjacent to the College, with the construction of 75 new houses, in addition to a conference centre, sports facilities and other elements of development. SMO currently has 6 other organisations active on campus, including the media companies Canan, Sealladh and MG Alba.

Although the development of SMO and its impact particularly on the South of Skye **is not something that can be replicated elsewhere in detail, there are aspects that make the SMO experience an instructive one in respect of the issue of Gaelic acting as an economic and social asset.**

It is based in an area of Skye where the traditional Gaelic community has been (like elsewhere) marginalised but **due to the development of the college, there now exists a very strong stratum of Gaelic in the wider community**. The college is the 3rd largest employer on the Island, after the Council and NHS, so has had a very important direct impact on jobs. **Linked to the development of SMO have been the developments in the local area** – the population of Sleat having doubled since 1971, from 450 to almost 900, with the school population having trebled – the local school is a Gaelic Medium School with an English unit attached. SMO's childcare facility Fàs Mòr has 70 children on its books now, freeing up parents for employment, and **ensuring a Gaelic language environment** for the children.

As well as its Higher Education function, **the college is seen as a community asset**, with the local arts association running 45 events during the year, 90% of which are staged in the college. The local Fèis an Eilein takes place at the same time as the College short courses, resulting in accommodation being totally full for this period. **Off-season, it is a hub for locals.**

The work of the college has many **social impacts** – it attracts artists to the area, there is an Artists in Residence programme, and there has been a growth in longer term links to Scotland's arts, such as a member of staff hosting the Radio nan Gàidheal Gaelic books programme. **In general, people are now coming to the area, recognizing that SMO is a special facility, with Gaelic at its heart.**

It has increased **Gaelic related job opportunities** – on the facilities side, people are employed there who would otherwise struggle. It pays better than local hotels, and it provides an opportunity to return for people previously born and brought up in Skye, who continue to be attracted to the lifestyle and the environment. The prospect of building 75 houses, 25% of which will be affordable houses, over the next 20 years within the Kilbeg project will allow it to make the type of impact previously created by the growth of Eilean Iarmain estate elsewhere in Sleat. The aim is to create a highly attractive local environment that will offer sustainable living standards, attract families to, and retain highly skilled people within Skye.

Future prospects include an extension of the media work undertaken by organisations such as Young Films and Sealladh in the Fàs studios in the SMO Media Centre, together with developments around the 'Connect G' initiative, which amongst other things aims to **promote Gaelic tourism, raise ambition** in the Gaelic media sector, and **show best practice** in using Gaelic to enhance community enterprise.

Sabhal Mòr Ostaig's vision is one which is profoundly Gaelic – all academic staff speak Gaelic as do 85% of the support staff (with the remainder currently learning the language). Courses are all delivered through Gaelic, and there is a focus on linking their increasingly important media work to their continuing and deepening research and teaching of Gaelic heritage and culture, to provide a new generation of Gaelic speaking graduates, informed of their heritage and able to communicate this in the language and methods of today and tomorrow.

## Sealgar Limited

(For more information see: <http://www.sealgar.co.uk>)

Sealgar is a creative industry sole trader, based on the Isle of Lewis offering a range of information technology services, providing advice on computers, websites and computer programming including website development and consultancy to a range of businesses and organisations.

As well as producing a range of websites for various clients, key projects that Sealgar has been involved with over recent years include:

- Working as a Java programmer and a system administrator on the Linux systems for **Greenspace Research** (within the University of the Highlands and Islands);
- Constructing dictionary, thesaurus and course-finder tools for **LearnGaelic** website;
- Adviser on the project where **The European Language Initiative** (TELI) translated parts of Windows and Office into Gaelic (including creating a small, cross-platform pan-dictionary search tool) which led to Sealgar repackaging the TELI-produced Dearbhair spellchecker into a format suitable for Mac OS X;
- Teaching a module on the internet at **Sabhal Mòr Ostaig**;
- Reversioning flash-based interactive whiteboard charts for **Stòrlann** and being invited to speak at a conference on Gaelic IT terminology; and
- Contributing to various **BBC Gàidhlig** programmes on IT-related matters.

This range of projects shows that **much of Sealgar's work is specifically related to Gaelic**, and the company owner notes that whilst other companies 'do Gaelic' and others 'do computers' not very many companies have both, and this provides Sealgar with a **distinctive offer as a business through their use of Gaelic**.

Choosing a Gaelic name for the business (Sealgar<sup>17</sup>) was very important, as the company wanted to be seen to be using Gaelic – which was not purely a commercial decision, but was more driven by a commitment to supporting Gaelic, although **Sealgar is finding that having a Gaelic business name is having a positive impact on the business**.

Customers respond positively to the name, it helps **engender trust**, and **reinforces Sealgar's position as a trusted and local company**. Gaelic is also used in communication with clients and this also has a positive and reassuring effect on clients.

For Dòmhnall Iain Dòmhnallach (Sealgar's owner), one of the drivers for using Gaelic within the business, is a desire to see Gaelic continue, given that Sealgar is based in, and that he comes from, a Gaelic speaking community.

<sup>17</sup> The company name is based on the Gaelic word Sealgair, although the name used is Sealgar – the company website states: "The name of the company is a slight anglicisation of the Gaelic word Sealgair, which means "a hunter" or "one who hunts"". <http://www.sealgar.co.uk/about.jsp>

The inter-relationship between the role of Gaelic in the business and the community is fundamental for Sealgar – the **presence of Gaelic in the community was a critically significant factor in the creation of the business**, and in the ongoing success of the business: *“Without Gaelic in the community there is no link between Gaelic and the wider world, and my own language would suffer as a result, and my company would suffer too”*.

This commitment to supporting Gaelic is driven by the recognition that Gaelic can draw people together and helps support community confidence, alongside a recognition that the profile and visibility of Gaelic needs to be increased, and the **benefits that can be derived from using Gaelic need to be better communicated to businesses**. Using Gaelic enhances **provenance and authenticity** for businesses that can help in both local and international markets.

For Sealgar, **Gaelic is a key asset** – most of the business’s turnover comes from working with Gaelic organisations (e.g. BBC ALBA, Stòrlann) and without Gaelic it would be impossible to work with these organisations.

As such, **Gaelic is critically important to the business**, and the impact of Gaelic on Sealgar’s business is estimated to **account for around 90% of turnover** – emphasising how important Gaelic is, and the added value that it provides to the business.

## Seallam, Northton, Harris

(For more information: <http://www.hebridespeople.com>)

Seallam is a small charitable organisation, limited by guarantee, which operates as a genealogy resource service for the Hebrides and the emigration areas. It also stages exhibitions of the local and Hebridean landscape and runs a bookshop

They employ two part time workers plus a consultant, employed through a three year LEADER/HIE project. The market it serves for genealogy is estimated to be 50% overseas with the rest of the market comprising 15% local, 15% Highlands and Island and perhaps 15% for the rest of Scotland. The overseas market is to a large extent Canada, and USA citizens who perhaps moved from Canada.

The use of Gaelic in the business depends on who comes in, although Gaelic speakers who work there use it between themselves. This is a similar approach to communication with clients. All promotion and exhibitions are bilingual and Seallam has a very large bilingual website. **Seallam believes that Gaelic is what makes the business distinctive.** Although word of mouth is the main source of publicity, Seallam sells lots of material in, and about, Gaelic. It also hosts concerts for Gaelic singers and can attract 60-80 people for concerts.

**Seallam believes Gaelic differentiates its products and services from other non-Gaelic organisations, and in general increases perceptions of authenticity and its appeal to target markets.**

Seallam believe that Gaelic **undoubtedly helps to stabilise/ensure the survival of the business/enterprise and raises local confidence.**

Seallam's experience is that the increasing media prevalence of Gaelic has **encouraged local people to choose Gaelic products** such as books. However for Seallam the bulk of people passing through are non-Gaelic speakers so it does not significantly affect their market to local Gaels.

The main barrier Seallam sees itself facing in terms **of increasing the prominence of Gaelic in the business** is labour force issues. *"The most important thing in a visitor centre is to let people hear the language, but we still don't have enough staff who are fluent".*

## Stòras Uibhist

(For more information: <http://www.storasuibhist.com>)

Stòras Uibhist are the largest community land owner in Scotland, owning South Uist, Eriskay and the majority of Benbecula – 93,000 acres with a population of approximately 3,000 people. Their remit is to drive **social and economic regeneration using the estate assets** which include an extensive sporting enterprise – for shooting and fishing. Stòras have operated the sporting lodge, 1000 crofts and extensive commercial property, since 2006.

The estate was historically run as a sporting estate for its landowner's pleasure, primarily having been used as a holiday home. Stòras Uibhist have large scale development projects on-going, with five projects planned over a period of five years from the buyout, and the aim was that the estate would break even by year five. A restored golf course was opened by summer 2008, plus a wind farm project that went live in March of 2013. The wind farm will be the revenue stream for 25 years with a projected £20million net revenue over the lifetime of the turbines. The Lochboisdale regeneration project also started its construction phase in 2013 with a 51 berth marina and fishery pier to be completed by Spring 2015, with further land available for housing and commercial development. Stòras are also planning a large scale drainage project to repair and upgrade the extensive land drainage system.

Within the Stòras Uibhist activities they use Grogarry Lodge - a separate building built in the 1800s by Gordon of Cluny as the base for **a week long Gaelic immersion course in Spring**. This is part-funded by Bòrd na Gàidhlig and Comunn na Gàidhlig, but staffed by local people who are native speakers of Gaelic.

During the rest of the year the lodge is used for a mixture of activities – business getaways, corporate hospitality, meetings, small conferences, and also for groups enjoying traditional sporting, golf and wildlife tourism. It is also open to local residents for events such as wedding receptions etc..

Whilst the majority of people coming to use the lodge are from England there are often French or Italian visitors as well, **who appreciate the cultural diversity and authenticity offered by the Gaelic language:**

*“People like the fact that Gaelic is the working language of the lodge – they say that to you. It's part of the cultural experience”.*

During the Gaelic immersion weeks, those taking part are attracted by a series of activities that **blend local traditions with the language itself**. This can involve peat cutting by hand – the fishery manager who speaks Gaelic borrows a peat bog from a local croft for a practical and participative few hours of hard work for the course participants. It can also involve a boat trip down to Mingulay with a Gaelic speaking boat captain. Other elements include fishing and ‘mountain worlds’ and archaeological sites and cèilidhs in Gaelic. **In the view of those organising such events “It mainstreams the language as part of the local economy”.**

All of the Stòras Uibhist board speak Gaelic. **The board uses Gaelic a lot amongst themselves and within the local community.** It has a quite high use in the informal side of the business although documentation is in English as default since not all staff speak Gaelic. However, **the board use Gaelic amongst themselves when they are emailing and the Stòras Uibhist website is bilingual.**

## Taigh Chearsabhagh, Lochmaddy, North Uist

(For more information: <http://www.taigh-chearsabhagh.org>)

Taigh Chearsabhagh is an arts centre based in the heart of Lochmaddy, which has gained growing accolades as **a major artistic and community hub in the Islands**. Taigh Chearsabhagh is perceived to be **the heart of the Gaelic community in North Uist**, although the services it provides to the community are not solely Gaelic – it hosts the local post office, a popular café and shop. There is a Museum and two galleries as well as studio space print workshop and darkroom facilities. Uist Film provides film training as well as productions. Lews Castle College who rent studio space provide educational provision through their arts courses. Taigh Chearsabhagh receives foundation funding from Creative Scotland.

Over the last twenty years Taigh Chearsabhagh has consistently been **a hub for Gaelic, artistic and heritage activities**. Currently it runs Taigh Cuil (music house nights) which is an initiative which consistently attracts 40 to 50 people on the evenings it is held. The organisers categorise it as approximately 50 percent Gaelic, and it is aimed primarily at local people, and is seen as ‘putting faith’ in local musicians, **although tourists also find it attractive**. In the view of the Trustees of Taigh Chearsabhagh, Gaelic has provided jobs for perhaps ten people in the locality in the last ten years – a major impact in the local rural community. **Taigh Chearsabhagh believes that the language and culture can be seen to be a continuing benefit to the community in terms of jobs and cohesiveness** and with the provision of better infrastructure which could help create more jobs, could contribute to drawing people back to the area.

The centre has started using **bilingual branding** on calendars, cups and T-shirts which are advertised on its Facebook page (every couple of weeks the Facebook page itself might be bilingual). **Taigh Chearsabhagh believe that the language gives it the ability to differentiate its products from other non-Gaelic services, and through its on-line activity this has helped open up new Scottish and international activity.**

## SECTOR OVERVIEWS

### Gaelic Cultural Hubs

Each of the three Gaelic cultural hubs surveyed within this research – An Lanntair (AL), Aros (A) and Taigh Chearsabagh (TC) although operating geographically distant from each other, **operated within a local context where they felt that the language and culture were intrinsic to their activities**. They did suggest however that it might not always be possible to reduce the Gaelic element to an easily measurable component.

In each case there was an openly stated acceptance of the role of Gaelic locally which had implications for their activities and how they were seen by the community. This was acknowledged in a slightly different manner by each, i.e. *“We see Gaelic as **a principled form of engagement locally for our activity**”* (A); *“Gaelic is **the heart and soul of the community here... ..We are doing this for locals first and tourism second**”* (TC); and *“I think for businesses that do not exist to promote Gaelic, it is very difficult to separate quantitatively or qualitatively what Gaelic brings other than that we know or feel instinctively that it brings something positive”* (AL).

In no case did they see any real issues caused by the difficulties in quantifying purely Gaelic aspects of their activity: *“Sometimes we might have difficulties in pinning down exactly what is Gaelic and what is culture. But **in overall terms this should not be seen as a problem – it is a feature**”* (A). In all cases they felt that part of what kept them going was community identification with what they did through the language and culture. *“**Our work through Gaelic has a huge effect on the wider community in terms of locals identifying with this business**”* (A).

Anchoring the culture and language in a way which seemed **forward looking** was something else that made the community see Gaelic **as an asset** locally: *“**You’re raising aspirations of young people that this place has a future**. It’s not what has been. It actually has relevance to them – it has a cool sort of difference, this is not about ‘their granny’”* (AL). *“The reason we get such a high proportion of people through the door here is **because they identify with us**”* (A).

More **direct impacts** are mentioned in the individual case study section of this report, but common to the work of all the hubs are the belief that their activities **impact onto the social side of communities**.

Where other similar or larger sized organisations are active within similar communities but do not engage with the community or the language, they are **‘seen just as visitor attractions’** (A)

From the evidence gathered within this research, it would seem that the distinguishing feature of the Gaelic cultural hubs, is the manner in which their activities **validate the language and culture**, but in a way which is likewise **reciprocated by the local communities** thus providing them with a stable economic and social environment within which to operate.



## The Gaelic Publishing Sector

(For more information: <http://www.gaelicbooks.org> and <http://www.acairbooks.com>)

Today's Gaelic publishing sector is centred around **Comhairle nan Leabhraichean** – the **Gaelic Books Council** (GBC), the main funding body for Gaelic literature. Within the sector there are active publishers such as **Acair** which is a major player, while other publishers such as Birlinn, have historically had some association with Gaelic publishing although would not categorise themselves as a Gaelic publisher.

Established in 1968, GBC is a not for profit charity, and company limited by guarantee. It is publicly funded (e.g. it receives foundation funding from Creative Scotland) although it does generate income through sales.

As the main funding body for Gaelic literature, its remit is very wide with the main focus being **the encouragement of writers and publishers in the Gaelic language**. At present, approximately between two-thirds and three-quarters of its funding is subsequently disbursed through a grants scheme, the aim being to allow potential and current writers in the language the security of being able to develop their creative work and bring it to fruition.

The GBC has a steady market linked to the existing Scottish Gaelic educational infrastructure – wherever there is Gaelic Medium Education – plus connections to universities and libraries, and other recognized Gaelic book outlets such as the arts centre **Aros, An Lanntair**, and book outlets including **McGillvery's** in the Uists and **Seallam** in Harris. In addition the GBC sees an important part of its role as outreach into communities where marketing potential exists. In this way, local Glasgow initiatives such as **Leabhraichean 's Craic** are also seen as very important to it, as is the **Aye Write** festival where the GBC supply simultaneous translation through headsets for Gaelic and bilingual events.

The GBC's work also includes **support to existing community writing**. One current such example is through encouraging community bards to engage in dialogue with the books council in order to obtain advice, and help find publishers. Another aspect of the Book Council's work is helping **safeguard the resources of organisations** such as the historical societies by putting into print appropriate materials produced by them. The GBC also ensure that contemporary work by other Gaelic organisations (such as the young persons' submissions to the sgeulachdan during the Mòd) can be likewise **made permanent through publishing, and thus act as an encouragement to potential future Gaelic writers**. This eye to the future while safeguarding the past has also helped inform GBC's recent strategy of encouraging the printing of autobiographies and biographies – a necessary approach given the current demographic of Gaelic speaking communities.

Adopting a forward looking strategic position, and adapting its priorities to the present, the GBC is planning for the long term to ensure Gaelic is given rightful recognition within the world of Scottish literary culture. The GBC **sponsors the Gaelic poem** in the national poetry day postcard initiative, and also **the Gaelic element in the Scottish Book Week free book publication**. It is aiming to open up other possibilities for Gaelic writing and writers and is currently in negotiation with the Scottish Book Trust to sponsor a new award for Gaelic education. The GBC has itself already **funded 10 'new Gaelic writers'** in the recent period – **a reflection of the high quality existing in the field**.

The GBC now aspires to work with the Scottish Book Trust to obtain funding for a young Gaelic writer project which could provide a year of master classes and mentoring support. In addition to this, it is in discussion with the Playwrights' Studio to establish a dedicated new Gaelic playwright award and wish to expand its current 'Donald Meek' award which is open to Gaelic writing of any genre. Applications to the latter have quadrupled in the last three years – **a reflection of positive changes in the area of Gaelic literature**. In the future the GBC also hope to expand this to involve private sponsorship for different aspects of the award – such as creating a children's award, or indeed a best children's illustrator award.

Other areas where the GBC hope there is a possibility to have a positive future impact include the Government sponsored Book Bug Bag scheme where the Scottish Book Trust provides parents of new born and pre-school children with Gaelic translations of the books in the regular Bookbug packs – now newly available to the Gaelic community. Similarly, it would hope to influence the Book Trust's publication of the 'best 50 Scottish books' which at present has no Gaelic element.

**The GBC believes that working together with other organisations can lead to a jointly beneficial approach** and cites as an example its current work with organisations such as Pròiseact nan Ealan in developing drama work in schools related to the current anniversary of WW1 – materials which can then be published and encourage further confidence within these local communities, and important age groups. *'Young people then don't have to leave their communities to engage with the world of publishing. They do the work, which is locally based, and then they see the fruits of their labour in print.'* The GBC believe this will help instil confidence in young people at an early age, and **allow them to see the asset that Gaelic is** as a way of understanding and recording real memories of their own communities.

Also in terms of developing future and longer term necessary skills in the area of Gaelic publishing, the GBC has been working on **the creation of a comprehensive editor's network** within Gaelic communities, to **strengthen local capacity** in this specialised field. Importantly this has also involved training for these individuals to gain some business acumen and personal confidence in this area and to **go on later and market their own skills and expertise**.

In short the Gaelic Books Council believe that the printed Gaelic language is a tremendous **asset for Scotland as a whole**, and particularly in Gaelic communities – and one which is only really beginning to come into its own, having had to fight against neglect of the printed word in Gaelic for a major part of the language's history.

## The Gaelic Media Sector

The Gaelic media sector is generally acknowledged as one of the crucial success stories of the policy change towards Gaelic that has taken place in the last 30 years. However it is one where many uncertainties still remain, particularly over the funding necessary to develop the channel and service as a whole.

This short case study is based on interviews with representatives of MG ALBA the main funding body for Gaelic TV, the BBC Gaelic department, and three of the independents working in the sector – MNE, MacTV and Sealladh. Some of the issues raised were ones common to broadcasting as a whole, although others reflected the particulars of the Gaelic media sector. Not all agreed with every point below, but there were many common views that emerged.

**Funding and future strategic development was a theme that was brought up by most interviewees** with changes within the power of MG ALBA to commission and schedule Gaelic programmes as well as administering a government fund was felt to be of crucial importance to allow future **stability to Gaelic independent producers**. Volume deals which MG ALBA could now strike with firms allowed these independents to take on permanent staff, and buy rather than lease equipment and thus cut costs, thus allowing greater output for the same money.

However there was a widespread feeling that finance was still lagging behind the possibilities the new channel was offering.

There was a general feeling that BBC ALBA was being successful as an all-round service as seen by the higher iPlayer figures when compared to the higher funded Welsh channel S4C. The problem of smaller audiences for radio (where higher fluency was required) were acknowledged: *“In BBC terms the cost per hour is very efficient, very efficient... ..but the cost per listener is very high”*.

All of those interviewed **were clear in terms of the Gaelic service as a social asset to Gaelic communities and Scottish society as a whole**. Most acknowledged the concept of core and wider audiences.

The BBC Gaelic unit felt that the heartland Gaelic core still viewed Radio nan Gàidheal as something that truly belonged to the Gaelic community and was used for their daily information. Interestingly they also believed that unlike other radio services, **they were succeeding in attracting a loyal youth following**. They had forged a long-term connection with the GME sector, both through direct visits to, and links between specific programmes and GME schools, and also the youth facing genres of music that were featured in programmes like Rapal.

It was also felt that the establishment of the weekday TV news programme **An Là had made a real impact in terms of normalisation of Gaelic as a language of choice** for viewing by the core Gaelic audience.

Overall the service was clearly leading to an increase in confidence within the different Gaelic communities throughout Scotland – in the traditional Gàidhealtachd, and with the ‘New Gaels’. One commentator suggested that due to the new inclusivity offered to young Gaelic speakers by new media (and enhanced broadcasting), young urban Gaels were making ground in areas that might not be expected – for instance Glasgow Gaelic School winning the recent schools debate against Sgoil Lioncleit.

It was also pointed out that according to System 3 polling, **BBC ALBA is today far better known than Radio Scotland**, and many examples were quoted of the social impact of the service, ranging from impact on the sports shown and places highlighted.

*“Without Gaelic broadcasting there would be no pro-12 rugby in Scotland. Look at the effect on the Glasgow Warriors – they now have full stadiums. So there is an economic value much wider than Gaelic TV. Motherwell vs. Ross County allows Dingwall or wherever to feature on TV and gain. It’s a Gaelic subvention that carries on to other areas”.*

With the reach of the BBC ALBA Channel now in the range of 8-900,000, **the value was felt to go way past the Gaelic community**. *Through covering mainstream sport, there was felt to be a cultural value in people for the first time hearing the language and being ‘in touching distance’ of it, perhaps even gaining some working knowledge of it. This, it was thought had led to a growing empathy in the nation.* Scots who had last had Gaelic in their family in the time of their grandparents were now able to re-contact that culture and this perhaps might help explain the **increasingly positive attitudinal statistics** that were being reported.

One company reported that they felt they were *on target to make programmes that would appeal to a Scottish not just a Gaelic audience and that the channel would be happy with them having hit the demographic.*

Some interesting points were made about Gaelic TV being *necessary* but not on its own *sufficient* for the transformation of Gaelic within Scotland. The core audience strategy of the service could be understood clearly. This would cater to the needs of already existing Gaelic speakers, as much as existing resources would allow. For non-Gaelic speakers attracted to the output of the station however, it was important that complementary action by others through increased bilingual signage, and increased opportunity to speak the language, should take place, in order to embrace those attracted to the station, and convince them that **Gaelic was a social asset that it was worth investing in** longer term. The TV channel could not be expected to do this on its own.

There was unanimity that **only finance and training prevented an expansion of the areas that could be covered on the channel itself**. There was also dismissal of any artificial limits being placed on what could be covered – exemplified in the belief that current affairs could be dealt with successfully in Gaelic (as is done in Eòrpa), but that there was something ‘illegitimate’ about covering sport in Gaelic.

Having acknowledged this, there was also recognition that **different genres of programmes and outputs were more lucrative than others** and similarly, that different genres had **differing impacts** in terms of the local economy outwith the individual firms. There should be no assumption that Gaelic language programmes could just be sold on elsewhere. The norm in the industry was to 're-voice' programmes, and the most lucrative asset tended to be not the programme itself, but scripts, visions of programmes, and formats which could be re-sold.

One example of recent investment made by MG Alba and Creative Scotland is in the development then subsequent production of a 3 part pilot Gaelic Drama by independent Production Company Young Films, the purpose of which is to test the viability of a returning Gaelic drama series, written and performed entirely in Gaelic. This would seek to provide employment and training opportunities for Gaelic speaking talent from directors through to writers and all potential crews.

**The high local impact of producing TV drama** has been acknowledged with specific examples given of what could be achieved by producing locally: *"Produced in September at the end of the tourist season, hotels at the bottom bit of Skye were full, when they're normally closing for winter – there were no empty beds and the shops were being used"*. This could entail extra costs however, if musicians had to be brought to rural areas, or the islands, with normal salaries being paid, but accommodation and travel needing added above that. The local economy would gain, but operating costs for the firm would be higher than in an urban area. **Thus drama, both on TV and radio, had extra challenges** in terms of resource implications.

In terms of whether the sector was being **transformed** by current activities, or whether it was only BBC and MG ALBA being consolidated it was felt that with 85% of MG ALBA's funding going into the independent sector **there were now spaces that didn't exist before** for independents and freelancers.

It was also felt that in terms of career paths it was no longer the *'leap into the dark'* that it might have been previously. MG ALBA reported that they worked with SMO to ensure that current media graduates and **trainees were being prepared for the contemporary needs** of the Gaelic media market *"this year drama for instance, then technical later"*. Students graduating from SMO now went on placements, sometimes with MG ALBA, sometimes with independents or the BBC. **At a non-graduate level openings were also being created** for younger people who would otherwise have faced a period of unemployment.

Some gaps in the skills repertoires were noted however, particularly in relation to Gaelic language abilities, with a dearth of craft and skilled people in the industry particularly in specialised areas such as camera crew. **It was felt that this needed a long term vision and investment.**

Overall there seemed to be a general consensus that trained Gaelic speaking technical crews were crucial to the well-being of the sector. In terms of future prospects, all were agreed that extra funding would be well used and would bring high dividends and that any challenges could be overcome. *“The only restriction to us is lack of funding. They could make more bigger and better programmes, if there was better funding. It keeps the business afloat but doesn’t provide for growth”.*

**It is clear from the above that Gaelic in the media sector is an asset, both for the companies involved, but also to the communities they serve – whether core, or wider throughout Scotland. This would suggest that if the political will is there to let Gaelic flourish, then further investment within this forward looking area will do much to help renew the language, get it increasingly acknowledged as valuable by non-Gaelic Scotland, and will help renew communities and enterprise within Gaelic communities and further afield.**

## Gaelic and Scotch Whisky

Consultations and focus group discussions have **highlighted the use of Gaelic in the branding of Scotch whisky, with many suggesting that over time Gaelic has become strongly embedded in the sector.** It is regarded as being a valuable asset in enhancing differentiation, emphasising the uniqueness of the product and positively contributing to customer perceptions of authenticity and provenance. Gaelic is also argued to have a role in attracting new customers in existing markets and helps to enhance the overall attractiveness of the area to visitors.

*“These companies are clearly selling these luxury whiskies in a way that the Gaelic name is important to them – otherwise they wouldn’t do so. The new ones wouldn’t have a Gaelic name. The Gaelic name links them back to the environment, and clearly the environment has a cachet – it’s clean etc. and these are the links. You’re definitely selling an image. These big companies are clearly using it as a marketing tool”.*

In the Scotch Whisky Association’s Statistical Report 2012<sup>18</sup>, it is estimated that the value of the Whisky industry in export terms is £4.723 billion (of which £769 million is from the export of Single Malt whisky). Its members employ 8,636 people in Scotland (8,863 in the whole of the UK). This employment is broken down in Table 4.1 by region<sup>19</sup>.

Area	Number of Employees
Central and Fife	1830
Grampian	1230
Highland	389
Lothian	785
Strathclyde	4263
Tayside	139
Rest of UK	227

**Source:** Scotch Whisky Association, 2012

Members of the Scotch Whisky Association (SWA) have 285 brands of Scotch Whisky<sup>20</sup>, and of this number it is estimated that more than one-fifth use Gaelic names, words or phrases in their product names; within this, three-quarters of those using Gaelic names, words or phrases use place-names, or anglicised versions of place-names.

Of the brands/products (produced by SWA members) which use Gaelic names, words, or phrases, almost 90% of them are Single Malts, and the vast majority of the brands and products that use Gaelic place names are Single Malts. Given that there are a total of 93 Single Malt brands produced by members of the SWA, **it is reasonable to conclude that Gaelic brand/product names tend to designate and exemplify the upper end of the market for whisky.**

<sup>18</sup> <http://www.scotch-whisky.org.uk/news-publications/publications/documents/statistical-report-2012>

<sup>19</sup> The presentation of the 2012 SWA report suggests that it uses the pre-1996 regional geographies for Scotland as the basis for its regional analysis of employment.

<sup>20</sup> <http://www.scotch-whisky.org.uk/members-brands/brands/>

However, notwithstanding the clearly recognisable role of Gaelic in the whisky industry, and in particular in the single malt end of the market, as set out above, the added value resulting from the use of Gaelic in whisky faces a number of issues:

First, the recognised added value of Gaelic is identified (by businesses/industry representatives) as being around the **enhancement and re-affirmation of authenticity and provenance, and perceptions of prestige** (which is also why Gaelic tends not to be used in blended whiskies).

Second, given the international markets within which Scotch whisky sells, it is important for any use of Gaelic not to confuse the consumer/purchaser – and therefore easy to pronounce (i.e. phonetically easy to say) Gaelic names, or anglicised versions of Gaelic names are sometimes used. Although it is also recognised that some single malts do successfully use Gaelic names – e.g. the Islay malts.

Third, consultations also highlighted that whilst acknowledging that Gaelic is used, and that it helps to underpin authenticity as noted above, Gaelic is not a key driver in this way. Whilst it is recognised as being useful, it is not fundamental. One consultee noted that:

*“It is an integral part of our brand but probably whisky would sell anyway”*

Fourth, in terms of any attempts to quantify the value that Gaelic adds to the single malt whisky market (generally or for any specific brand or product), this is not even attempted by some of those involved in the sector. This is due to the difficulties and challenges of valuing brands in general – trying to quantify the specific added value of a Gaelic dimension to a particular brand/product is not something that consultees have attempted to do (with the exception of Praban na Linne which did seek to do so for this research study – see the case study earlier in this section).

Overall, **Gaelic’s role in the Scotch whisky market**, and in particular the single malt Scotch whiskies, is **recognised as adding to, and assisting with reinforcing authenticity and provenance**, especially in niche markets. However, consultees do suggest that other aspects (emphasising quality through the fact that it is Scotch whisky and emphasising the geographic location and related place provenance) are, on balance, more important factors than the use of Gaelic.



## The Tourism Sector

(for more information see e.g.: <http://www.gaelic-rings.com>)

The tourism sector is one where several initiatives have taken place over the last ten years, seeking to link Scotland's **Gaelic heritage and Scotland's Gaelic present** with visitors wishing to experience the **distinctiveness** offered by the language and culture.

The Cearcaill na Gàidhlig is one such approach – a collaborative marketing initiative launched in 2007 to **promote the richness of Gaelic language and culture** throughout the Hebridean islands and the West Highland mainland. (This initiative was a multi-agency partnership between Argyll & Bute Council; Bòrd na Gàidhlig; Comhairle nan Eilean Siar; The Highland Council; CalMac; VisitScotland; and HITRANS – the Highlands and Islands Transport Initiative).

The first of the Gaelic Rings, or Cearcaill na Gàidhlig, was launched in July 2007 based on Caledonian MacBrayne's Islands Hopscotch route taking in Oban, Barra, Eriskay, South Uist, Benbecula, North Uist, Skye and Mallaig.

Following the success of this initiative with **300 local businesses along the route** becoming partners, the Gaelic Rings project was then expanded to form the basis of six journeys with the support of **650 local businesses** en route.

These businesses supported this **bilingual initiative** by advertising it within their establishments and distribution of literature. These businesses ranged from B&Bs to local shops to tourist attractions. **Ten thousand copies of a small bilingual book were published** consisting of favourite 'personal journeys' of six highly respected Scottish writers including Angus Peter Campbell, Mairi Macarthur, Donald Meek and Hugh Cheape. These journeys were based on CalMac's Island Hopscotch routes. In addition, **one hundred and fifty thousand (150,000) leaflets were distributed** across Scotland and at key entry points to the UK regarding this.

In addition a bespoke **multilingual** website was launched [www.gaelic-rings.com](http://www.gaelic-rings.com) which also included 'photographic journeys' with backing music from Runrig. The initiative also saw bilingual advertising in the relevant tourist press and CalMac Explore etc., together with a **bilingual branding presence** on the West Highland line between Inverness and Kyle of Lochalsh.

This initiative is a recognition that Gaelic language and culture plays a significant part in **the mixture of factors that attract tourists to Gaelic speaking areas** and can also **provide a thread** that links travel, accommodation, hospitality and food and drink into a richer experience for the domestic and international visitor.

Further afield, VisitScotland are actively investigating how the diversity offered by Gaelic speaking communities in the Gàidhealtachd can be accessed by visitors, often attracted by the opportunity of hillwalking or birdwatching, within landscapes notable for their Gaelic names.

Thus they are considering the construction of Gaelic destination plans allowing tourists to draw from the richness of communities where Gaelic continues to be strong. There is already experience of this within communities such as Shawbost in Lewis and Trotternish in Skye – **the latter having successfully used local knowledge to position the community as one in which Gaelic learners can be immersed to help their language.**

The concept of a 'Hebridean Way' encompasses this holistic vision, developing cycling and walking from the Butt to Barra, in a manner similar to the West Highland way but with Gaelic at its heart as part of the infrastructure itself.

The concept of different Gaelic 'hubs' along the way – some dealing with Gaelic heritage, others with birdlife, and others with Gaelic music would be seen as a way of **marking the authenticity of Gaelic communities**, each using aspects of Gaelic as an asset. This could be either through a visit to **an interpretive centre**, the experience of a **local Cèilidh**, or the understanding of **the landscape through well explained bilingual signage**, or a visit to a bird sanctuary within a Gaelic speaking area.

Some of this **Gaelic cultural add-in** has taken place already – as can be seen for instance in the refurbishing of the museum at Lews Castle, Stornoway and the use of bilingual signage within that.

There is an acknowledgement that an expansion of Gaelic linked tourism would need some additional infrastructure such as bed spaces – but this has been a long recognised issue in parts of the area concerned.

**Gaelic linked tourism cannot be seen in isolation from traditional tourism but can add substantially to it.** Current discussions that are taking place in the Outer Hebrides around the concept of 'Hebtember' – a month of events happening in September focusing on arts and crafts, envisaged as pan-island for a whole month – aiming to bring arts and crafts to the fore, clearly have the opportunity to provide Gaelic learning or showcase opportunities. Already the Fèisean and the HebCelt Festival, together with Blas events **inject Gaelic into the core of existing live and contemporary music.**

Similarly the whisky trail on Islay, has an intimate connection with the Gaelic provenance of the distilleries featured within the trail – and as is shown in other case studies here, **this can be used to boost a connection with the language and culture through local hoteliers featuring Gaelic as an asset.**

## 5. WIDER LINKAGES & INTER-RELATIONSHIPS BETWEEN GAELIC DEVELOPMENT AND ECONOMIC/SOCIAL DEVELOPMENT

### Introduction

Sections 3 and Section 4 of this report have dealt with the way in which Gaelic is used by businesses, enterprises and community organisations – identifying the extent to which there is an economic and social role for Gaelic as an asset (Section 3) and provided examples of where Gaelic serves as an asset and is adding value to businesses, enterprises and community organisations (Section 4).

This section draws on the primary research findings, and reflects back to some of the wider issues set out in Section 2 earlier in this report, giving **consideration to the inter-relationship between Gaelic and economic and social development**, including the role of Gaelic in supporting economic and social development and also the role of economic and social development in supporting Gaelic.

### Inter-relationships – Gaelic development & economic/social development

Whilst the remit of this research – and the focus of the primary research carried out through the surveys, interviews and focus groups – has been on the economic and social value of Gaelic as an asset, a **common thread that emerged** in many of the one-to-one and group consultations, and in the feedback and comments from the survey respondents, was **around the inter-relationship between Gaelic development and economy and community development**.

This was partially a response, or a reaction, to the idea of treating Gaelic as a narrow, economic asset – something that some consultees do not appreciate or welcome, underpinned by a concern that focusing too strongly on this approach to Gaelic is contentious and has the potential to demean, or exploit, Gaelic, rather than support and help to enhance the development of the language. This relates back to the issues around ‘authentic’ versus ‘tokenistic’ use of Gaelic discussed in Section 2.

The key themes that emerge around these issues, and about the wider inter-relationships between Gaelic and economic development include the following.

First, the importance of **positively treating Gaelic as an asset** – i.e. making sure that the use of Gaelic as an economic asset also positively contributes to Gaelic development as well as economic development, as part of a virtuous circle of development is an important consideration highlighted by consultees during the primary research. This approach aligns with Walsh’s ‘linguistic political economy of development’ framework as set out in Section 2. Some of those who emphasised this issue did so in response to perceptions and concerns about focusing on exploiting Gaelic for a narrow economic benefit.

*“I would be cautious around a too strong a focus on the economic value of something. Gaelic and language should not be measured and marketed in economic terms solely. It is dangerous to reduce culture and history to a spreadsheet”.*

*“To look at it in an economic way is to devalue it. If you lose your language, you lose your way of relating to the world, your culture, your way of understanding things. How can you value it? It’s like being healthy”.*

Second, an appreciation amongst some consultees that whilst Gaelic can be an asset for businesses and community organisations, this is typically (beyond those businesses/organisations for whom Gaelic is their core remit) as a feature, enhancement or add-on. In this, it is commonly recognised that, especially in the economically fragile areas, **it is jobs and the economy that can help to drive the development of Gaelic**, more than the use of Gaelic that can help to drive the economy.

Consultees noted that there is stronger flow of causation between increased economic activity and the potential increased role, prominence and normalisation of Gaelic than for Gaelic to be the main driver for economic activity. In other words, increased jobs in Gaelic areas (the Gàidhealtachd) drives and helps support, maintain, and increase the use of Gaelic; rather than Gaelic being the driver for jobs. Having said this, the increased awareness, profile, and social value of the language, together with the increased pride in communities which businesses using Gaelic ascribe to their activities (see below) is now generally accepted as a factor in the regeneration of communities in the Gàidhealtachd.

Third, the importance of **normalisation of the language** in its development was highlighted by many as an important aspect – this includes the use of Gaelic by businesses, but also more generally (e.g. in the media), in education (i.e. Gaelic Medium Education) and in wider society.

Through the closing of many of the gaps in Radio nan Gàidheal's coverage and the establishment of BBC ALBA – in particular its daily news service An Là – there is now a **greater perceived feeling of 'normalisation' of the language in the modern media sector**. These programmes and services receive a lot of praise and recognition across Scotland and beyond (see the Gaelic Media case study in Section 4 for more detail), with anecdotal feedback emerging through this research of people wishing they had learnt Gaelic as a result of BBC ALBA, and music programming reaching a wider audience. In addition, **broadcasting and media provide interesting, sought after, and reasonably well paid employment that would not exist without Gaelic**.

Furthermore, on average almost 800,000 viewers per week<sup>21</sup> are now more aware of the existence of Gaelic language and culture as a result of the popularity of BBC ALBA, and a number of consultees for this research study stressed that it is important this is built on through education and the management of tourism development opportunities within this market.

In literature, being published and read in Gaelic is now more common, which raises its profile and again contributes to normalisation *"It's now normal to write a novel, not a strange and exceptional thing!"* Gaelic has also been more accepted as a strong language of literature at book/literature festivals (especially at Ullapool and also to an extent at the Edinburgh International Book Festival and the Glasgow 'Aye Write' Festival), which leads to a new respect for the language, and a greater acceptance that writing in Gaelic is part of Scottish literary culture. The major barrier in terms of publishing tends to be the size of print runs, which often prevents some titles being translated into Gaelic – such as the popular Harry Potter series.

<sup>21</sup> <http://news.scotland.gov.uk/News/Taic-ionmhais-do-MGAlba-b96.aspx> (April 16 2014)

There is a growing belief in firms and organisations using Gaelic that this itself further impacts in Gaelic speaking society:

*“They’re now speaking Gaelic in the pub – a combination of our work, the experience of Gaelic Medium Education, Fèisean nan Gàidheal, BBC ALBA...”*

The quote below **emphasises the inter-relationship and mutually beneficial dynamic between economic development and Gaelic development from an individual business perspective:**

*“The importance is a two-way street – we believe that the skills we hold can benefit the language, its development and the desire of others to work in or with the language, while at the same time business related to the language generates a significant amount of business for us”.*

### Gaelic as a driver for establishing the business/organisation

The survey evidence shows that the influence of Gaelic on the decision to establish a business or organisation is far more important for community organisations than it is for businesses and enterprises (Tables 5.1 and 5.2). Gaelic was a critical factor in the establishment of just over one-fifth of businesses/enterprises that responded to the survey (and these businesses are all within the business types identified in Section 3 as those where ‘Gaelic is core/fundamental to the business’).

**TABLE 5.1: How significant an influence was the presence of Gaelic in your community to the creation of your business/enterprise?**

	Response Percent	Response Count
Critical factor	22.2%	18
Important factor	28.4%	23
Of minor importance	22.2%	18
Of no importance	19.8%	16
Don't know	7.4%	6

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=81)

For community organisations, Gaelic was a critical factor in the decision to establish the community organisation for more than half of the respondents (52%) and is also regarded by more than half the respondents (56%) as a critical factor in the range of activities the organisation offers (Table 5.3).

**TABLE 5.2: How significant a factor did Gaelic play in the decision to establish your community organisation?**

	Response Percent	Response Count
Critical factor	52.2%	24
Important factor	6.5%	3
Of minor importance	10.9%	5
Of no importance	23.9%	11
Don't know	6.5%	3

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=46)

**TABLE 5.3: How significant a factor does Gaelic play in the range of activities your organisation offers?**

	Response Percent	Response Count
Critical factor	55.6%	25
Important factor	15.6%	7
Of minor importance	17.8%	8
Of no importance	13.3%	6
Don't know	0.0%	0

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=45)

The quotes below provide some examples of the perceived importance of Gaelic to the establishment of the business or organisation, with **Gaelic being recognised and appreciated as one of the drivers for the business**:

*“The organisation was formed to support the Gaelic language and culture”.*

*“We were set up as a Gaelic Centre”.*

*“Our raison d’être is the teaching of Gaelic”.*

*“Pride in the language and culture gave the confidence to start the business”.*

*“It would be impossible to base [the business] in an area without the language fluency we can access here”.*

*“Without Gaelic there is no business here”.*

### Business/organisation use as a driver for Gaelic

Looking at the other side of this relationship – business association with, and use of, Gaelic as the driver in enhancing the recognition and value of Gaelic with the community, there is clear evidence that this takes place – with more than one-third stating that business use strongly enhances it, and **more than 60% of business survey respondents stating that business use/association with Gaelic strongly or moderately enhances the value of Gaelic in the community**.

**TABLE 5.4: To what extent do you think your business’s/enterprise’s association with, and use of, Gaelic enhances the recognition and value of Gaelic within your local community?**

	Response Percent	Response Count
Strongly	35.8%	29
Moderately	28.4%	23
Slightly	27.2%	22
Does not enhance	0.0%	0
Don't know	8.6%	7

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=81)

The **pattern is even more pronounced within community groups** and organisations, where with almost one-half of respondents describe the association/use of Gaelic as strongly enhancing the value of Gaelic, and more than three-quarters describing it as strong or moderate enhancement.

**TABLE 5.5: To what extent do you think your organisation's association with, and use of, Gaelic enhances the recognition and value of Gaelic within your local community?**

	Response Percent	Response Count
Strongly	45.7%	21
Moderately	30.4%	14
Slightly	10.9%	5
Does not enhance	8.7%	4
Don't know	4.3%	2

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=46)

The quotes below provide some examples of the importance of business/enterprise and community organisation use of Gaelic supporting the development of the language, by helping to normalise its use and also show the economic value of Gaelic.

*"I would think the more the language is used in all aspects of local business increases the attachment/pride people have in the communities".*

*"Businesses using Gaelic brings the language out in to the open and begins to change the discourse around the language".*

*"Using Gaelic in our area enables us to keep the language alive and encourage its use. We employ Gaelic tutors to teach the language".*

*"Us playing concerts and playing on television enhances the profile of Gaelic to a wider community".*

*"The use of Gaelic by businesses and organisations promotes the language and ensures there are employment opportunities for Gaelic speakers, in turn increasing prestige for the language and confidence in its use".*

*"As can be seen from Creative Scotland's use of Gaelic – use of the language in these contexts normalises it, gives it a proper status, gives confidence and support and therefore leads to further developments".*

*"The use of the language around our manufacturing facility does mean our staff and the wider local community are aware that Gaelic is welcome at our business and is the language of choice for a number of our staff".*

*"Thousands of young people who take part in Fèisean engage with Gaelic, many more than would do so in formal education. All our events promote Gaelic's use in communities and Gaelic is used at all event in publicity and introductions. The activities that young people take part in helps them identify Gaelic with something they enjoy".*

Finally, there are also examples where the **mutually beneficial dynamic** between economic and Gaelic development is identified:

*“The organisation was set up over 25 years ago but the Gaelic in the community continues to support our work and vice versa”.*

*“Without Gaelic in the community there is no link between Gaelic and the wider world, and my own language would suffer as a result, and my company would suffer too”.*

*“Many of our activities, for example the Gaelic courses, are promoted primarily because of the resource of a local Gaelic-speaking community. This is a unique selling point for some visitors”.*

*“As a cultural centre we would not have developed as we are without the Gaelic language as a tool and attraction for our customers”.*

*“The presence of Gaelic students visiting the community during our courses from all over the world raises the profile of Gaelic in the minds of local people. It brings direct economic benefits to families who host the students, and emphasises the cultural importance of the community’s Gaelic heritage to many more”.*

It is also important to reflect on one element of caution that has been noted, with the quote below exemplifying a notable theme from consultees, about employment opportunities relying on public sector funding support:

*“Adding to profile and awareness, certainly, but in terms of employment opportunities – that is dependent on funding support – there’s a danger that the jobs will be there for a little while and then lost when the funding support ends. If there were more opportunities within private companies, I believe the situation would be better”.*

### **Inter-relationship between Gaelic use by Business and Gaelic Development**

The specific benefits resulting from the use of Gaelic by businesses, and also the use of Gaelic by community groups and organisations is captured in the two main tables on the following pages. Both the business/enterprise survey and the community group/organisation survey asked respondents a series of questions about the use of Gaelic by their business/organisation. Figures 5.1 and 5.2 on the following pages summarise the results.

For businesses, the aspects of business use of Gaelic that the highest proportion of businesses strongly agree with are that it:

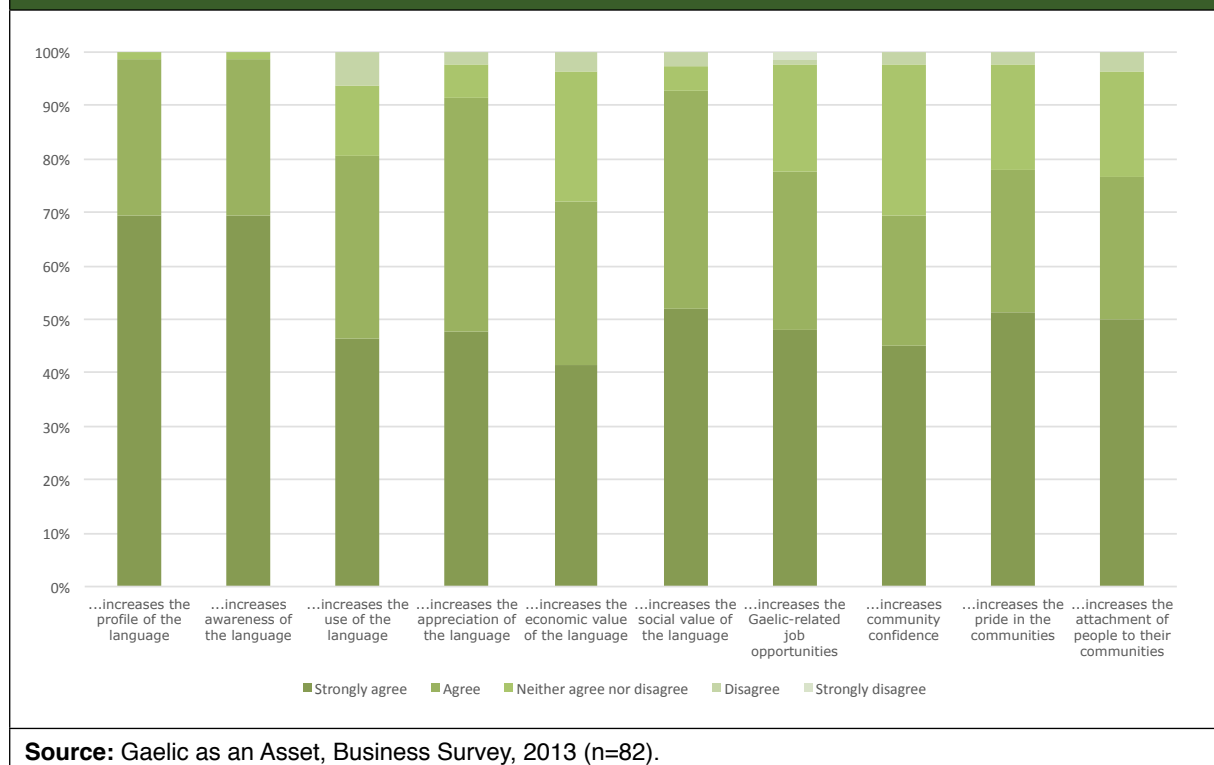
- ...increases the **profile** of the language (70% strongly agree)
- ...increases **awareness** of the language (70% strongly agree)
- ...increases the **social value** of the language (52% strongly agree)
- ...increases the **pride** in the communities (51% strongly agree)

These results suggest that the business use of Gaelic impacts more on Gaelic development and social development (rather than economic, **with those strongly agreeing that business use of Gaelic increases the economic value of Gaelic being the lowest ranked response**).



Taking the percentage of respondents that either agreed or strongly agreed with the statements, again **emphasises the language and social development aspects** – with profile, awareness, use, appreciation, social value, and pride all exceeding 75% of respondents agreeing/strongly agreeing. One of the economic aspects – increases in Gaelic related job opportunities also had more than 75% of respondents agreeing/strongly agreeing.

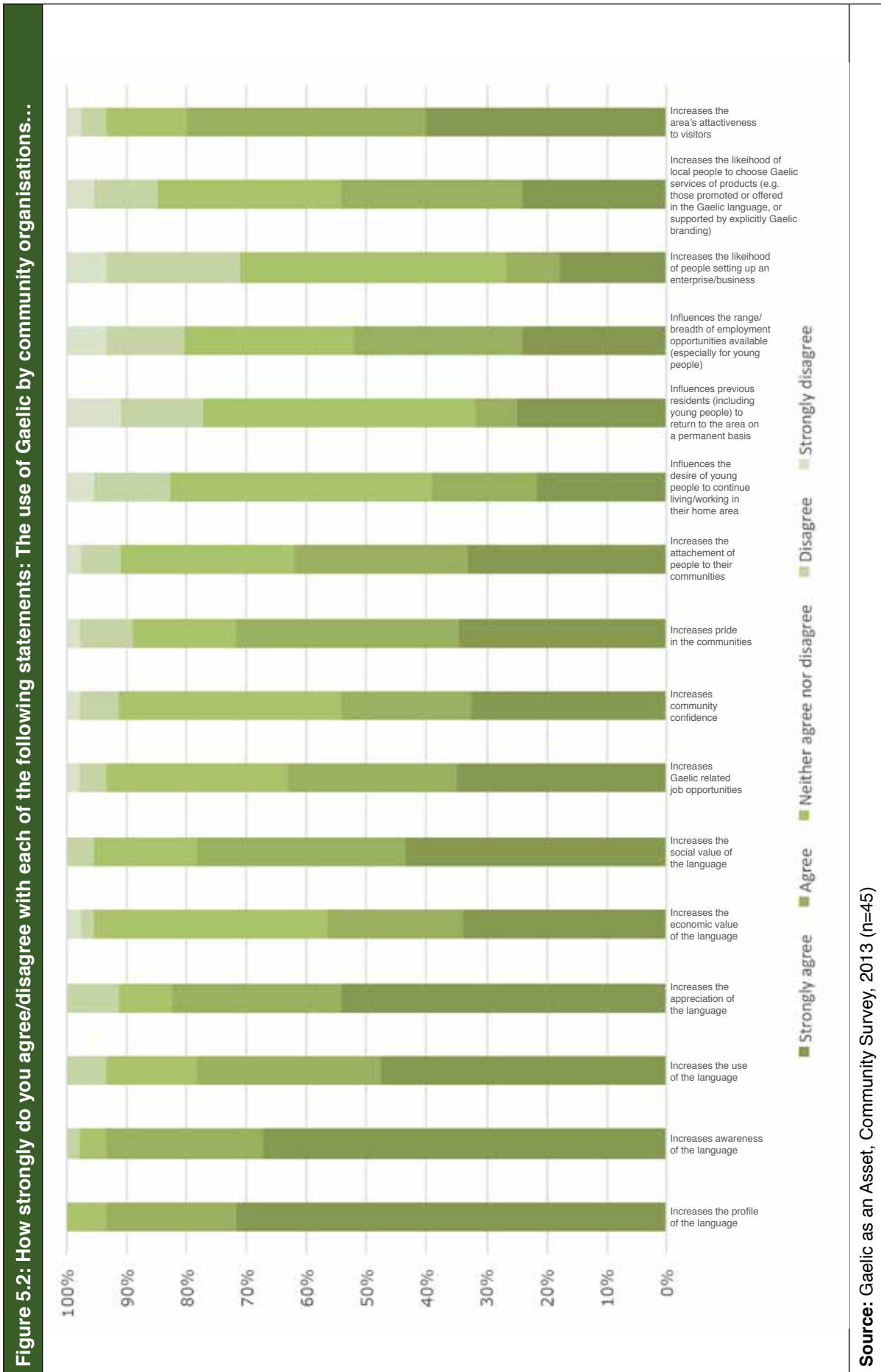
**Figure 5.1: How strongly do you agree/disagree with each of the following statements: The use of Gaelic by businesses...**



For community organisations, the aspects of community organisation use of Gaelic that the highest proportion of respondents strongly agree with are:

- ...increases the **profile** of the language (72% strongly agree)
- ...increases **awareness** of the language (67% strongly agree)
- ...increases the **appreciation** of the language (54% strongly agree)

Taking the percentage of respondents that either agreed or strongly agreed with the statements, again **emphasises the language and social development aspects** – with profile, awareness, use, appreciation, and social value, all exceeding 75% of respondents agreeing/strongly agreeing. One of the economic aspects – increases the area's attractiveness to visitors also had more than 75% of respondents agreeing/strongly agreeing.



### Key Findings – Section 5

The research highlights **the (two-way) inter-relationship between Gaelic and economic and social development** – the role of Gaelic in supporting economic and social development and also the role of economic and social development in supporting Gaelic. Key themes that emerge around these issues, and about the wider inter-relationships between Gaelic and economic development include:

- *The importance of positively treating Gaelic as an economic and social asset.*
- *Acknowledgement that it is jobs and the economy that can help to drive the development of Gaelic, more than the use of Gaelic on its own that can help to drive the economy.*
- *The importance of normalisation of the language, including the use of Gaelic by businesses, but also more generally (e.g. in the media), in education (i.e. Gaelic Medium Education) and in wider society.*
- *There is a growing belief in firms and organisations using Gaelic that this itself further positively reinforces impacts in Gaelic speaking communities.*
- Gaelic was a **critical factor/driver** in the establishment of just over one-fifth of businesses/enterprises surveyed, and more than half the community organisations.
- More than 60% of businesses stated that business use of/association with Gaelic **enhances the value of Gaelic in the community**, and the pattern is even stronger within community organisations.
- The inter-relationship between Gaelic use by businesses and Gaelic development is evidenced in the research which shows that business use of Gaelic:
  - ...increases the **profile** of the language (70% strongly agree)
  - ...increases **awareness** of the language (70% strongly agree)
  - ...increases the **social value** of the language (52% strongly agree)
  - ...increases the **pride** in the communities (51% strongly agree)

### Prìomh Thoraidhean – Roinn 5

- Tha an rannsachadh a' leigeil cuideam air an **eadar-dhàimh (dà-thaobhach) a tha eadar Gàidhlig agus leasachadh sòisealta is eaconamach** – an dreuchd aig a' Ghàidhlig ann a bhith a' cur taic ri leasachadh eaconamach is sòisealta agus cuideachd an dreuchd aig leasachadh eaconamach is sòisealta ann an bhith a' cur taic ris a' Ghàidhlig. Tha na prìomh chuspairean a tha a' nochdadh co-cheangailte ris na ceistean sin, agus mu na h-eadar-dhàimhean nas fharsainge eadar a' Ghàidhlig is leasachadh eaconamach, a' gabhail a-steach na leanas:
- *Cudromachd a bhith a' làimhseachadh na Gàidhlig gu dearbhach mar so-mhaoin eaconamach is shòisealta.*
- *Aithne gur e obraichean agus an eaconamaidh a chuidicheas gus leasachadh na Gàidhlig a stiùireadh air adhart, nas motha nas urrainn do chleachdadh na Gàidhlig a-mhàin an eaconamaidh a neartachadh.*
- *Cudromachd àbhaisteachadh a' chànain, a' gabhail a-steach cleachdadh na Gàidhlig taobh a-staigh ghnathachasan, ach cuideachd san fharsaingeachd (m.e. anns na meadhanan), ann am foghlam (i.e. Foghlam Meadhan Gàidhlig) agus sa chomann-shòisealta nas fharsainge.*
- *Tha creideas a tha a' sìor fhàs a' nochdadh ann an gnothachasan is buidhnean a tha a' cleachdadh na Gàidhlig gu bheil seo fhèin (cleachdadh na Gàidhlig le gnothachasan is buidhnean) a' sìor dhaingneachadh gu dearbhach na buaidhean taobh a-staigh choimhearsnachdan Gàidhlig.*
- Bha a' Ghàidhlig na **feart/adhbhar deatamach** ann a bhith a' stèidheachadh beagan a bharrachd air aon-còigeamh de na gnothachasan/iomairtean ris an do rinnear co-chomhairle, agus còrr is leth de na buidhnean coimhearsnachd.
- Thuir còrr is 60% de ghnathachasan gun robh cleachdadh na Gàidhlig/ceangal ris a' Ghàidhlig a' **cur ri luach na Gàidhlig sa choimhearsnachd**, agus tha am pàtran nas làidire buileach taobh a-staigh bhuidhnean coimhearsnachd.
- Tha an t-eadar-dhàimh eadar cleachdadh na Gàidhlig le gnothachasan agus leasachadh na Gàidhlig ri fhaicinn anns an rannsachadh, a tha a' sealltainn gu bheil cleachdadh na Gàidhlig le gnothachasan:
  - ...ag àrdachadh **iomhaigh** a' chànain (70% de luchd-freagairt ag aontachadh gu làidir).
  - ...ag àrdachadh **mothachadh** a thaobh a' chànain (70% de luchd-freagairt ag aontachadh gu làidir).
  - ...ag àrdachadh luach **sòisealta** a' chànain (52% de luchd-freagairt ag aontachadh gu làidir).
  - ...ag àrdachadh **pròis** anns na coimhearsnachdan (51% de luchd-freagairt ag aontachadh gu làidir).

## 6. QUANTIFYING THE ECONOMIC VALUE OF GAELIC AS AN ASSET

### Introduction

This section focuses on the quantification of the economic value of Gaelic as an asset. This includes presenting the results from the primary research on the quantitative economic value of Gaelic as an asset, as well as setting out some further reflections on the issues relating to quantification which have emerged during the research, including consideration of the issues and challenges for businesses and enterprises on quantifying the value of Gaelic as an asset. The section also gives some consideration to the potential economic value of Gaelic as an asset to the wider economy.

As explained in Section 1, this research is an **initial, baseline study** which has sought to explore and assess the current (and potential) role of Gaelic as an asset economically and socially, and where possible to quantify the value of Gaelic as an asset. However, it has **not been possible to capture a wide enough evidence base to estimate the overall economic value of Gaelic as an asset to the wider economy of the Highlands and Islands and of Scotland.**

As such, **the main results presented in this section only capture some aspects or parts of the quantifiable value of Gaelic as an economic asset. The results should not be regarded as comprehensive or representative of the wider economy.**

Nevertheless, they do provide some informed estimates of the economic value that Gaelic adds to businesses – and also provide evidence about the scale of value that Gaelic adds to businesses within specific sectors, localities, and sizes.

When considering these results it is also important to recall what the remit of this research was, and what it was not:

*The research is not trying to capture the entire social and economic impact of Gaelic, it is seeking to illuminate the social and economic value of Gaelic where it is used as an asset and where it has the potential to be used as an asset.*

*The study quite uniquely focuses on organisations that use Gaelic as an asset to derive economic or social benefits. The research should highlight where Gaelic adds value to a transaction-social or economic, rather than where it costs the public purse. Much other research has already been undertaken to quantify public sector inputs and outcomes, which this study does not seek to replicate.*

As discussed in Section 1 and Annex 1, the scale of response and detail of response to the survey and primary research about this issue in particular (quantifying the value of Gaelic) is not sufficient to provide a robust and comprehensive analysis of the economic value of Gaelic as an asset to the wider economy. However, this **section seeks to provide an estimate for the current potential value of Gaelic as an asset based on a number of key assumptions and caveats.**

## Background to Quantifying the Value of Gaelic as an Asset

As set out in Section 4, **the majority (70%) of businesses that replied to the survey stated that the use of Gaelic represents an asset to their main business/enterprise activity.** The most common manifestations of the benefits that Gaelic provides were identified as: enhancing the **distinctiveness/uniqueness** of products/services; enhancing customer **perceptions of authenticity and provenance** of products/services; and **increasing the appeal of products/services to your target markets.**

Those businesses that identified Gaelic as an asset to their business were asked subsequent questions that sought to quantitatively measure the benefits of using Gaelic to the business/enterprise, and also to understand how easy or difficult it is to measure the value of Gaelic to the business.

Focusing on the businesses that identified Gaelic as an asset, more than **one-third were able to provide some measurement of the value of Gaelic to the business.**

These results show that the **majority of businesses that previously identified the use of Gaelic as an asset to their business are not able to provide any estimates for the measurement of the value.** This in itself is an interesting finding from this research – for the majority of businesses responding, whilst they recognise that Gaelic is an asset to their business, they are not able or are not willing to quantify the value that Gaelic adds.

There seem to be a range of factors and issues that have led to this issue – where enterprises recognise that Gaelic is an asset to their business, but they are unable or (in some instances) unwilling to calculate or estimate that value. Given the implications of this finding for the quantification of the value of Gaelic as an asset within this report, and more generally, the various factors and issues that relate to this are considered later in this section once the quantitative results themselves are presented.

The next two sub-sections present the findings around the quantitative value of Gaelic to businesses focusing on two aspects:

- **First, an analysis of the economic value of Gaelic for the specific respondents able to provide measures of the value of Gaelic to their business; and**
- **Second, an assessment of the estimated value of Gaelic to the businesses that identified Gaelic as an asset, but were unable/unwilling to provide any measure of the scale of this.**

This second element draws on the findings from the businesses able to quantify the value of Gaelic, and **adopts a matching process** to the businesses that identified Gaelic as an asset but were not able to provide any measure of the value to their business.

## Quantifying the Economic Value of Gaelic as an Asset to Businesses

This analysis focuses on those businesses that were able to quantify the impact of Gaelic on their business or enterprise and assesses the value that can be attributed.

As noted above, the results presented only capture some aspects or parts of the quantifiable value of Gaelic as an economic asset, and the results should not be regarded as comprehensive or representative of the wider economy.

However, they do provide some example estimates of the economic value that Gaelic adds to businesses as well as some evidence about the scale of value that Gaelic adds to specific businesses within particular sectors, particular localities, and particular sizes of business.

In total, data was provided by **38 businesses/enterprises** (through a combination of the survey replies and the one-to-one interviews) who were able to provide some measures of the quantitative value of Gaelic to their business. The quantitative responses themselves showed a range of values for the impact of Gaelic on the businesses, ranging from 100% (typically for those businesses and organisations where, as described in Section 3, Gaelic is core/fundamental to the business) to single figure percentages where Gaelic is used as an additional feature or enhancement by businesses (to help reinforce authenticity and distinctiveness).

The specific aspects that the businesses were asked to measure the impact of Gaelic in relation to were: increases in turnover, increases in people employed, increases in the number of customers/visitors, and increases in price.

The issues around the use of Gaelic by businesses and its relationship with prices (especially any opportunities around charging a price premium) were addressed in Section 4, and are not revisited here. The analysis below therefore focuses on the impacts of Gaelic on businesses in terms of turnover and employment.

All of the survey respondents were asked to provide information about the size of the business in terms of both turnover and the number of staff, and this information was used in combination with the quantitative assessment of the impact of Gaelic on the business to provide a means of analysing, on a case-by-case basis, the impact of Gaelic on each business. The results of this were then aggregated to provide this overall figure.

In total, for the **38 businesses/enterprises** that were able to provide measures to quantify the value of Gaelic, the total increase in turnover attributed to the impact of Gaelic on the businesses is in the **region of £25 million**.

However, it must be acknowledged that some key Gaelic organisations are included within this cohort of 38 respondents – in particular it includes the BBC Gaelic Unit, MG ALBA, Sabhal Mòr Ostaig, and the Gaelic Books Council (all of which are in receipt of significant public sector support). If these organisations are excluded from the analysis to allow the focus to be directed towards private sector businesses and enterprises using Gaelic as an asset, the **turnover attributed to the impact of Gaelic for the remaining 34 businesses/enterprises is almost £4million**.

In terms of employment, for the **22 businesses/enterprises** that were able to provide measures to quantify the value of Gaelic, the total increase in the number of people employed attributed to the impact of Gaelic on the businesses is **354 FTE jobs**.

However, once again, it must be acknowledged that some key Gaelic organisations are included within this cohort of respondents. If these organisations are excluded from the analysis to allow the focus of the analysis to be directed to private sector businesses and enterprises using Gaelic as an asset, the **increase in the number of people employed attributed to the impact of Gaelic for the remaining 18 businesses is 47 FTE jobs**.

In terms of the characteristics of the businesses and organisations within the cohort of businesses able to quantify the value of Gaelic, the following tables provide a summary of three key aspects – geographic location, industrial sector, and business size.

Table 6.1 shows that almost two-thirds (63%) of the businesses able/willing to quantify the value of Gaelic as an asset are located within two local authority areas – Eilean Siar and Highland.

<b>Table 6.1: Geographic Breakdown of businesses able to quantify the value of Gaelic</b>		
<b>Location (Local Authority)</b>	<b>Response Percent</b>	<b>Response Count</b>
Argyll & Bute	3	8%
East Ayrshire	1	3%
Edinburgh, City of	2	5%
Eilean Siar	13	34%
Glasgow City	5	13%
Highland	11	29%
Perth & Kinross	1	3%
Stirling	1	3%
West Dunbartonshire	1	3%
<b>Total</b>	<b>38</b>	<b>100%</b>
<b>Source:</b> Gaelic as an Asset, Business Survey, 2013.		

Given the concentration of Gaelic in these geographic areas (see Section 2), this finding is not surprising. Glasgow, Argyll & Bute and Edinburgh aside, the respondents for the rest of the local authorities are single businesses. As such, it would not be appropriate to draw any overarching conclusions that could be generalised to the wider population (of other survey respondents) from such a geographic breakdown, or from the average turnover or employment due to Gaelic on a spatial basis.

Whilst average rates per local authority of the proportion of turnover (or employment) attributable to Gaelic can be calculated for each area, given the low number of respondents for all areas except Eilean Siar and Highland it is not possible to establish the extent to which these would be representative of the wider population of businesses using Gaelic or describing Gaelic as an asset in these localities, and they should not therefore be applied more widely to other businesses.



In terms of industrial sector breakdown, Table 6.2 below summarises the sectoral breakdown of the 38 respondents using industry level SIC (Standard Industrial Classification)<sup>22</sup>.

The table shows that the creative industries (captured across more than one industry – e.g. J and R) accounts for at least half of the 38 responses.

Table 6.2: Industrial breakdown of businesses able to quantify the value of Gaelic		
Industry	Number of Responses	Percent of Responses
C : Manufacturing	3	8%
G : Wholesale & retail trade; repair of motor vehicles and motorcycles	1	3%
I : Accommodation and food service activities	1	3%
J : Information and communication	9	24%
M : Professional, scientific and technical activities	4	11%
N : Administrative and support service activities	1	3%
O : Public administration and defence; compulsory social security	3	8%
P : Education	2	5%
R : Arts, entertainment and recreation	13	34%
S : Other service activities	1	3%
<b>Total</b>	<b>38</b>	<b>100%</b>

**Source:** Gaelic as an Asset, Business Survey, 2013.

Once again, a number of the 38 responses are single representatives of particular sectors, and as such, it would not be appropriate to draw any overarching conclusions that could be generalised to the wider population (of other survey respondents) from such an industrial breakdown, or from the average turnover or employment due to Gaelic on an industrial basis.

Whilst average rates per industry of the proportion of turnover (or employment) attributable to Gaelic can be calculated, given the low number of respondents for all except the creative industries it would not be possible to establish the extent to which these would be representative of the wider population of businesses using Gaelic or describing Gaelic as an asset in particular sectors, and they should not therefore be applied more widely to other businesses.

In terms of **business size**, there is a clear dominance of microbusinesses, especially when the larger Gaelic organisations (mentioned above) are removed from the summary analysis. This shows that the vast majority of businesses responding to the survey able to quantify the value of Gaelic to their business are micro-businesses.

<sup>22</sup>The industry level classification provides an appropriate level to summarise the industrial sectors of the 38 respondents. However, the precise location of some of the key sectors using Gaelic can be unclear. For example, food and drink production falls under C, whilst food and drink service activities are captured within I. Similarly, whilst much of the creative and cultural industries are captured within R, there are also key aspects of Gaelic creative and cultural industries within J – especially programming and broadcasting, publishing, and computer programming.

**Table 6.3: Business Size breakdown of businesses able to quantify the value of Gaelic**

Business Size	Number of Responses	Percent of Responses
Micro (<10)	31	82%
Small (<50)	5	13%
Medium (<250)	2	5%
<b>Total</b>	<b>38</b>	<b>100%</b>

**Source:** Gaelic as an Asset, Business Survey, 2013.

Overall, the businesses for whom Gaelic is an asset and that are able to quantify the value of Gaelic to their business more commonly have the following characteristics: They are located within Eilean Siar or Highland, they are working in the creative and cultural industries, and they are micro-businesses.

### Estimating the Economic Value of Gaelic as an Asset to Other Businesses

Following the analysis set out above of the quantitative value of Gaelic to these specific businesses, consideration was given to various ways in which these results could be drawn on to infer or impute the value of Gaelic to those businesses that also identified Gaelic as an asset to their respective businesses, but that were not able/not willing to provide any measure of the value.

As set out above, there is insufficient evidence to be able to make generalisations to the wider population based on geographic, industrial or size characteristics of the firms that are able to quantify the value of Gaelic to their businesses. Instead, a matching process has been implemented, and the approach adopted is set out below alongside the estimated results.

In summary, this element of analysis seeks to draw on the findings from Group 1 (the respondents able to quantify the value of Gaelic), and through **a matching process** with Group 2 (the survey respondents that identified Gaelic as an asset but were not able to provide any measure of the value to their business), infer the value of Gaelic to the second group based on a process which sought to match on a case-by-case basis each business in Group 2 to the most relevant case(s) in Group 1.

The group of businesses responding to the survey that identified Gaelic as an asset, but that were not able to measure the value of this quantitatively consists of 66 businesses. The characteristics of these businesses, against the same three factors (geography, sector and size) as set out above for those that were able to quantify the value of Gaelic, is presented in the tables below.

**Table 6.4: Geographic Breakdown of businesses identifying Gaelic as an asset, but not able to quantify the value of Gaelic**

Location	Number of Responses	Percent of Responses
Argyll & Bute	6	9%
Edinburgh	4	6%
Eilean Siar	22	33%
Falkirk	1	2%
Glasgow City	5	8%
Highland	24	36%
Moray	1	2%
Perth & Kinross	2	3%
(blank)	1	2%
<b>Total</b>	<b>66</b>	<b>100%</b>

**Source:** Gaelic as an Asset, Business Survey, 2013.

**Table 6.5: Industrial breakdown of businesses identifying Gaelic as an asset, but not able to quantify the value of Gaelic**

Industry (SIC)	Number of Responses	Percent of Responses
A : Agriculture, forestry and fishing	2	3%
C : Manufacturing	5	8%
E : Water supply; sewerage, waste management & remediation activities	1	2%
F : Construction	1	2%
G : Wholesale and retail trade; repair of motor vehicles & motorcycles	4	6%
H : Transportation and storage	2	3%
I : Accommodation and food service activities	6	9%
J : Information and communication	4	6%
M : Professional, scientific and technical activities	3	5%
O : Public administration and defence; compulsory social security	1	2%
P : Education	3	5%
Q : Human health and social work activities	1	2%
R : Arts, entertainment and recreation	25	38%
S : Other service activities	4	6%
(blank)	4	6%
<b>Total</b>	<b>66</b>	<b>100%</b>

**Source:** Gaelic as an Asset, Business Survey, 2013.

**Table 6.6: Business Size breakdown of businesses identifying Gaelic as an asset, but not able to quantify the value of Gaelic**

Business Size (no. of employees)	Number of Responses	Percent of Responses
Micro (<10)	53	80%
Small (<50)	7	11%
Medium (<250)	4	6%
Large (250+)	2	3%
<b>Total</b>	<b>66</b>	<b>100%</b>

**Source:** Gaelic as an Asset, Business Survey, 2013.

Assessing these characteristics (comparing Tables 6.1, 6.2 and 6.3 with 6.4, 6.5 and 6.6 respectively) shows that **there is a consistency between the two groups**<sup>23</sup> especially in terms of business size (i.e. dominance of **micro-businesses** in both groups – 82% and 80% respectively); and key geographic locations (**Eilean Siar** – 34% and 33% respectively, and **Highland** – 29% and 36% respectively). For industrial breakdown there is a greater range of sectors within Group 2, but a key consistency in terms of sectors is the **creative and cultural industries** – 34% and 38% respectively.

For these specific characteristics it is possible to assess the average impact of Gaelic as an asset in terms of turnover and employment for these businesses. For example, the average impact of Gaelic on turnover for businesses in Eilean Siar would be 43%, and for Highland would be 36%. For micro-businesses the average impact of Gaelic on turnover would be 35%, and for the broad industry group capturing creative and cultural industries would be 32%. However, in each of these cases the median values are consistently lower (20%, 25%, 20%, and 20% respectively) and the wide range of values in the responses suggests that there is a sufficient volatility and divergence in the responses to caution against making use of such averages<sup>24</sup>.

Instead, a more nuanced matching process was adopted, whereby each of the 66 businesses in Group 2 (i.e. identifying Gaelic as an asset but not able to measure the value) was matched with the closest businesses in Group 1 (those able to provide a measure of the value of Gaelic to the business).

The matching process was based on the business characteristics set out above – whereby each match can be made by giving consideration to:

- Matching by recognition of Gaelic as an asset
- Matching by geographic location
- Matching by business size
- Matching by sector

In order to find the most appropriate match, the **process involved seeking a match against all four criteria** – i.e. matching businesses between the two groups based on: recognition of Gaelic as an asset, same geographic location, same sector, and same business size. In cases where there was more than one match business the average metrics about the quantitative value of Gaelic as an asset were used. In the instances where only a single match was available, consideration was given to the relevance/appropriateness of the match on a case by case basis.

In cases where a match was achieved against three criteria, the strength and appropriateness of the match was assessed on a case by case basis and only included when there was sufficient merit to do so.

In addition, the matching process also gave due consideration to the mean and median metrics set out above for each of the spatial areas, business sectors and business sizes as a way of benchmarking and checking the results.

<sup>23</sup> i.e. between Group 1 (the respondents able to quantify the value of Gaelic), and Group 2 (the respondents that identified Gaelic as an asset but were not able to provide any measure of the value to their business).

<sup>24</sup> The average impact of Gaelic on employment shows similar patterns: Eilean Siar (mean 33%, median 5%); Highland (mean 20%, median 0%); microbusinesses (mean 23%, median 0%), Arts, entertainment and recreation (mean 16%, median 0%).

Bringing all of the information on the matching characteristics together, Tables A6.1 and A6.2 in Annex 6 present two matrices – setting out the 66 survey respondents to whom the metrics from the 38 quantitative respondents could be applied. In terms of geography, sector and size, the spread of responses (see Tables A6.1 and A6.2) again supported the use of a matching process rather than applying overall average proportions.

Based on the quality of data available, and the results of the matching processes as set out above, it was decided to carry out the quantitative analysis only for those businesses located in the two geographic areas where most of the respondents are located – i.e. Eilean Siar (22 respondents that identified Gaelic as an asset but did not provide any measure of value) and Highland (24 respondents that identified Gaelic as an asset but did not provide any measure of value).

The result for Eilean Siar are presented below. However, for Highland, the matching process did not provide sufficient results – with only a limited number of matches being achieved across all three characteristics (location, sector and size) – especially when inappropriate matches and respondents reliant on public sector support are excluded.

For Eilean Siar, focusing on the 22 respondents from Eilean Siar that identify Gaelic as an asset, but are not able to quantify the value, a matching process allows the following estimates to be identified (based on 17 replies as five had no sectoral match):

- Turnover: £1.7 million (which forms part of a total of £3.1 million for Eilean Siar combining these 17 respondents with the original respondents – i.e. of the original 34 businesses/enterprises, businesses in Eilean Siar accounted for £1.4 million of the £4 million impact, so adding the two cohorts together results in a total of £3.1 million.).
- Employment: 11 FTE jobs (which forms part of a total of 36 FTE jobs for Eilean Siar combining the 17 respondents with the original respondents – i.e. of the original 34 businesses/enterprises, businesses in Eilean Siar accounted for 25 FTE jobs of the 47 FTE jobs, so adding the two cohorts together results in a total of 36 FTE jobs).

In summary, taking the results from the 34 enterprises able to quantify the value of Gaelic to their business and the results from the 17 enterprises included in the matching process together, the **turnover attributed to the impact of Gaelic for these 51 businesses/enterprises is around £5.6 million.**

As mentioned earlier in this section, these results are partial results only, and **only capture some aspects or parts of the quantifiable value of Gaelic** as an economic asset. They are not representative of all businesses in Eilean Siar, but provide some examples and evidence about the role and quantitative value of Gaelic as an asset for businesses.

## Potential Economic Value to the Economy of Gaelic as an Asset

As noted at the start of this Section, the **majority of businesses that responded to the survey, and that identified the use of Gaelic as an asset to their business, were not able to provide any estimates for the measurement of the value of Gaelic to their business.**

The subsection above has identified the current value of Gaelic to the cohort of businesses (34 businesses) that were able to quantify the value of Gaelic to their business, and has also, through the matching process set out earlier in this section, been able to estimate the economic value of Gaelic as an asset for a cohort of businesses located in Eilean Siar (22 businesses). However, this does not provide any overall estimate of the current potential value of Gaelic as an asset to the wider Highlands and Islands or Scottish economy.

As set out in Section 1 and Annex 1, the scale of response and detail of response to the survey and other primary research about this issue in particular (quantifying the value of Gaelic) is not sufficient to provide a robust and comprehensive analysis of the economic value of Gaelic as an asset to the wider economy. However, this **current sub-section seeks to provide an estimate for the current potential value of Gaelic as an asset based on a number of key assumptions and caveats.**

The analysis set out below has been achieved by combining the relevant survey results from this research study with data from the most recent Census (Census 2011<sup>25</sup>) about Gaelic ability (as originally set out in Section 2 of this report), and also with data from the Scottish Government about the size of the Growth Sectors<sup>26</sup>.

### Key Assumptions and Caveats

As noted above, the **analysis included within this subsection is only possible based on a number of key assumptions and caveats.**

First, as previous research has identified (see Section 2), and as the primary research for this study has confirmed (see Section 3), the key sectors where Gaelic is recognised as being used as an asset are: the **creative industries; tourism (including heritage); and food and drink.** Therefore, the analysis contained within this section focuses on these three sectors only. The definitions/classifications used for these sectors within this analysis are those used by the Scottish Government<sup>27</sup>.

Second, the findings of the primary research for those that are able to quantify the value of Gaelic as an asset (the 34 businesses/enterprises) show that the **average percentage value of turnover that businesses attribute to Gaelic is 34.6%. The median percentage value attributed to Gaelic by the same respondents is 20%.** (Using a median analysis in effect sets out an estimation of the likely minimum economic value of Gaelic as an asset to the economy. Whilst on balance the impacts are more likely to be closer to the median than the mean aggregation, using the mean analysis alongside the median highlights the potential range of value based on available evidence).

<sup>25</sup> <http://www.scotlandscensus.gov.uk/ods-web/data-warehouse.html>

<sup>26</sup> <http://www.scotland.gov.uk/Topics/Statistics/Browse/Business/Publications/GrowthSectors>

<sup>27</sup> See <http://www.scotland.gov.uk/Topics/Statistics/Browse/Business/Publications/GrowthSectors> for a document outlining the final agreed definitions of the Growth Sectors.

Third, it would (of course) be **unreasonable to assume that the results from the survey can be generalised to all businesses across Scotland in these three sectors**, as many of the businesses throughout Scotland within these sectors do not make use of Gaelic as an asset. However, there is also a lack of evidence about the scale of use (i.e. the number of businesses in the wider population) of those that do use Gaelic as an asset but that did not respond to this survey or engage in the primary research elements of this study. In order to address this, some type of proxy measure has to be used to estimate and appropriately weight the potential scale of the value of Gaelic as an economic asset.

**Table 6.7: Gaelic Ability by Local Authority Area**

Local Authority	Total Working Age Population*	Total Population with 'Gaelic ability'**	Percent with Gaelic ability
Aberdeen City	167,153	2,777	1.66%
Aberdeenshire	77,536	2,173	1.22%
Angus	79,353	633	0.80%
Argyll & Bute	60,308	3,197	5.30%
Clackmannanshire	36,656	401	1.09%
Dumfries & Galloway	102,953	756	0.73%
Dundee City	105,334	929	0.88%
East Ayrshire	86,383	717	0.83%
East Dunbartonshire	71,681	860	1.20%
East Lothian	68,524	593	0.87%
East Renfrewshire	60,844	617	1.01%
Edinburgh, City of	354,064	4,815	1.36%
Eilean Siar	18,737	11,139	59.45%
Falkirk	109,868	892	0.81%
Fife	256,259	1,987	0.78%
Glasgow City	437,592	7,634	1.74%
Highland	160,968	11,151	6.93%
Inverclyde	57,258	483	0.84%
Midlothian	58,016	431	0.74%
Moray	64,134	837	1.31%
North Ayrshire	95,738	827	0.86%
North Lanarkshire	238,143	1,541	0.65%
Orkney Islands	14,850	163	1.10%
Perth & Kinross	100,366	1,485	1.48%
Renfrewshire	123,404	1,230	1.00%
Scottish Borders	77,761	602	0.77%
Shetland Islands	16,149	158	0.98%
South Ayrshire	77,314	562	0.73%
South Lanarkshire	221,305	1,579	0.71%
Stirling	63,315	889	1.40%
West Dunbartonshire	64,158	681	1.06%
West Lothian	123,812	978	0.79%
<b>TOTAL (Scotland)</b>	<b>3,749,936</b>	<b>63,717</b>	<b>1.70%</b>

**Source:** DC Research analysis of 2011 Census, Table DC2120SC (Release 3b, March 2014); April 2014

\* Population aged 16 to 69

\*\* Drawn from the following Census categories: Understands but does not speak, read or write Gaelic; Speaks, reads and writes Gaelic; Speaks but does not read or write Gaelic; Speaks and reads but does not write Gaelic; Reads but does not speak or write Gaelic; Other combination of skills in Gaelic.

Given the current absence of any other suitable data<sup>28</sup> the most recently released data from the 2011 Census has been used. This has involved analysing Census 2011 data released in March 2014 about Gaelic language skills at the local authority level<sup>29</sup>. This data is available from age 3 upwards (as presented in the early part of Section 2 of this report). However, for this analysis the proportion of people of working age (assumed to be the population aged 16 to 69) with any level of Gaelic ability has been used. Table 6.7 summarises the number and proportion of the working age population by local authority.

Using these results as a weighting to estimate the potential economic value of Gaelic as an asset is not without issues. For example, it implicitly makes an assumption about the relationship between Gaelic ability within the population in an area and the use of Gaelic by businesses within the area. As such, it is likely to exclude, or under-represent, the use of Gaelic in businesses where there is no, or limited, knowledge of Gaelic within the owners/employees of the business, and also under-represent high value-added businesses that use Gaelic as an asset (especially where the value added does not require significant Gaelic ability within the firm, but where Gaelic is used as an asset).

Notwithstanding these issues, this data has been used (in the absence of any other data) to provide some means of estimating the potential value of Gaelic as an asset for the wider economy. In effect, this data has been used to provide a means of estimating the potential scale of the economic value of Gaelic as an asset, **based on the assumption that the economic value of Gaelic as an asset for these three sectors within a local authority is related to the level of Gaelic ability of the population within the local authority.**

As such, it should be acknowledged that this **approach is effectively underpinned by a rationale that assesses what the value of Gaelic would be if the results of the survey were replicated across the key sectors in the economy where Gaelic is recognised as an asset**, using the scale of Gaelic ability in each area as a weighting. As such, **the results below should be regarded as giving an indication of what the benefits of Gaelic as an asset could be to Scotland if the survey results were replicated across the wider economy.**

## Results

Adopting this approach, and applying it to Growth Sector statistics for 2011 (the most recently available data) allows an estimate of turnover to be developed for the three Growth Sectors considered here – Creative Industries (including digital), Food and Drink (excluding agriculture) and Sustainable Tourism (Tourism related industries).

<sup>28</sup> Although it is anticipated that additional Census 2011 data may become available in the future about the economic sectors/industries that Gaelic speakers work within, and if/when this data becomes available this could be used to refresh and further enhance this analysis.

<sup>29</sup> In particular, Table DC2120SC – Gaelic language skills by sex by age from Release 3B (March 2014) has been used – available via <http://www.scotlandscensus.gov.uk/ods-web/data-warehouse.html>.



The results (Table 6.8 below) show that, in total, the potential economic value of Gaelic as an asset to the Scottish economy could be in the region of between £81.6 million and £148.5 million.

<b>Table 6.8 Summary of the Potential Economic Value of Gaelic as an Asset (Estimation)</b>		
<b>Sector</b>	<b>Turnover (median estimate) (£ million, 2011)</b>	<b>Turnover (mean estimate) (£ million, 2011)</b>
Creative industries (including digital)	16.1	29.4
Food and Drink (excluding agriculture)	40.9	74.5
Sustainable Tourism (Tourism-related Industries)	24.5	44.6
<b>Total</b>	<b>81.6</b>	<b>148.5</b>
<b>Source:</b> DC Research analysis of: Gaelic as an Asset, Business Survey, 2013; Census 2011, Table DC2120SC (Release 3b, March 2014); and Scottish Government, ONS (Annual Business Survey)		

As noted above, it is important that any consideration of these results fully acknowledged the key assumptions and caveats that have been used in order to carry out this estimation. **The results should be regarded as giving an indication of what the benefits of Gaelic as an asset could be to Scotland if the survey results were replicated across the wider economy.**

A summary of the same results, but split by local authority rather than by sector is set out below in Table 6.9.

<b>Table 6.9: Local Authority Summary of the Potential Economic Value of Gaelic as an Asset (Estimation)</b>		
<b>Local Authority</b>	<b>Turnover (median estimate) (£ million, 2011)</b>	<b>Turnover (mean estimate) (£ million, 2011)</b>
Aberdeen City	3.6	6.6
Aberdeenshire	3.3	6.0
Angus	0.2	0.4
Argyll & Bute	5.0	9.2
Clackmannanshire	0.1	0.2
Dumfries & Galloway	1.0	1.9
Dundee City	0.6	1.0
East Ayrshire	0.2	0.3
East Dunbartonshire	0.4	0.7
East Lothian	0.2	0.4
East Renfrewshire	0.1	0.3
Edinburgh, City of	6.7	12.2
Eilean Siar	20.1	36.6
Falkirk	0.7	1.2
Fife	1.8	3.2
Glasgow City	11.1	20.2
Highland	15.9	28.9
Inverclyde	0.1	0.2
Midlothian	0.2	0.3
Moray	2.7	4.9
North Ayrshire	0.5	0.8
North Lanarkshire	0.5	0.9
Orkney Islands	0.3	0.6
Perth & Kinross	1.8	3.3
Renfrewshire	0.6	1.1
Scottish Borders	0.5	0.9
Shetland Islands	0.5	0.9
South Ayrshire	0.6	1.1
South Lanarkshire	0.6	1.0
Stirling	0.9	1.6
West Dunbartonshire	0.2	0.3
West Lothian	0.7	1.3
<b>Total</b>	<b>81.6</b>	<b>148.5</b>

**Source:** DC Research analysis of: Gaelic as an Asset, Business Survey, 2013; Census 2011, Table DC2120SC (Release 3b, March 2014); and Scottish Government, ONS (Annual Business Survey)

## Issues and Challenges with Quantifying the Value of Gaelic as an Asset

As noted at the introduction to this section, and earlier in this report, this research has identified a number of issues around the quantification of the value of Gaelic as an asset for businesses and enterprises.

The primary research identified that for many businesses and enterprises, whilst they do identify that Gaelic is an asset for their business or enterprise, they find it difficult to provide any quantitative measures of the value that Gaelic adds to the business. For example, whilst 70% of businesses identified Gaelic as an asset, **less than one-third of these businesses were able to provide any quantitative assessment** of the value of Gaelic to their business.

For many businesses they face both **practical and conceptual difficulties in attempting to provide any quantitative assessment of the value of Gaelic to their business**. There are a range of factors and explanations that have been offered for this from the businesses consulted and surveyed, and these can be grouped into the following themes and issues:

- For some businesses, they have simply **never had to think about quantifying the added value they derive from using Gaelic** in the business and therefore have no basis on which to do so.
- Other businesses report that they **do not collect the financial or statistical evidence that would be required** to accurately assess the value of Gaelic to their business.
- Others report that they **do not think there are any means of quantifying the value that Gaelic adds to their business** at the current time. Whilst **some would not know how to do so at all, others do identify ways in which they could develop the means** to do so (e.g. adding questions to visitor or customer surveys).
- Many report that Gaelic is an important or fundamental (but intangible) asset – ‘*intrinsic*’, ‘*part of the fabric*’, ‘*Gaelic is integral*’, ‘*thread through the culture*’ – and **attempting to disentangle and quantify the value of Gaelic is extremely challenging** (even impossible) for them.
- Finally, **treating Gaelic as a narrow, economic asset is not appreciated or welcomed by some**, with concerns that narrowly focusing on this is contentious and has the potential to exploit Gaelic, rather than support and help to enhance the development of the language.

In addition to the above issues, it is important to recognise that the **difficulties in quantifying the value of Gaelic affect a wide range of businesses that report Gaelic as an asset but cannot quantify the value it provides**. This includes businesses that describe Gaelic as ‘very important’ or ‘paramount’ to the business – so this *quantification challenge* affects the full spectrum of businesses that use Gaelic as an asset.

There are **examples where businesses find it straightforward** to identify the value of Gaelic to the business – these are typically where Gaelic is core to the business, and the business would not exist without it, or those where there is a clear, tangible Gaelic service or product that is provided, making it straightforward to quantify the added value of these particular products or services to the business.

Given all of these issues, and the implications they have had for the findings from this research (i.e. the fact that whilst the report has provided an assessment of the economic and social value of Gaelic as an asset, the extent to which any quantification of this has been achieved has been limited to a particular cohort of the consultees and is not generalizable very far beyond this specific cohort without relying on some key assumptions), consideration can be given to the following potential actions to help address these issues:

- Develop **processes through which additional primary data can be collected** from businesses that use Gaelic but did not respond to the survey (or responded but did not provide measures about the value of Gaelic). This will increase the potential for the quantitative results produced to be more representative, and therefore more generalisable to the wider population of businesses.
- Develop **support processes/systems and methods** (to be delivered by the relevant support agencies and organisations) **through which businesses can develop and implement ways to measure the value of Gaelic** to their business.
- **Educate and inform businesses about the benefits to them (and the benefits generally) of being able to quantify the value of Gaelic to their business.** This will help to address the concerns noted above, allowing the merits of assessing Gaelic in this way to be understood, and provide reassurance that it is a way of adding value to, and not detracting from, Gaelic development.
- **Systematise the collection of relevant data from businesses (about the role and value of Gaelic to the business)** through key business support organisations that engage with businesses using Gaelic (e.g. Highlands & Islands Enterprise, Comunn na Gàidhlig, etc.)
- **Make use of additional data due to be released in the future from the 2011 Census.** This data will allow a better understanding of the role of Gaelic in specific economic sectors to be developed which will in turn inform the ways through which the value of Gaelic can be quantified in a more robust and systematic way.

## Key Findings – Section 6

- This research sought to quantify the value of Gaelic as an asset, however, the **results only capture some aspects of the quantifiable value of Gaelic as an economic asset, and the results should not be regarded as comprehensive or representative of the wider economy.**
- Whilst **70% of businesses stated that the use of Gaelic represents an asset** to their main business/enterprise activity, the **majority of these businesses are not able to provide quantitative estimates of the value** of this.
- Around **one-third of businesses that regard Gaelic as an asset were able to provide some measurement of the value of Gaelic to the business**, and an analysis of the data provided (and excluding key Gaelic organisations reliant on public sector support from the analysis to allow it to focus on private sector businesses) found that the **total turnover attributed to the impact of Gaelic for 34 businesses/enterprises is just less than £4million.** Alongside this (and again excluding key Gaelic organisations reliant on public sector support from the data to allow the analysis to focus on private sector businesses), **the total increase in the number of people employed attributed to the impact of Gaelic for the 18 businesses able to measure this is 47 FTE jobs.**
- Overall, the businesses for whom Gaelic is an asset and that are able to quantify the value of Gaelic to the business commonly have the following characteristics: they are located within **Eilean Siar or Highland**, they are working in the **creative and cultural** industries, and they are **micro-businesses.**
- A second level of analysis used **a matching process** through which businesses recognising Gaelic as an asset but not able to provide measures of the value were matched with businesses able to provide values on a case-by-case basis. In order to find the most appropriate match, the **process involved seeking a match against four criteria** – i.e. matching businesses between the two groups based on: recognition of Gaelic as an asset, geographic location, sector, and business size.
- Adopting this process provided matches for 17 businesses/enterprises that identified Gaelic as an asset but did not quantify the value (all of which are located in Eilean Siar). This enabled the following estimates to be made of the value of Gaelic as an asset to these businesses/enterprises:
  - *Turnover: £1.7 million (leading to a combined total of £3.1 million for Eilean Siar when the matched respondents and original respondents<sup>30</sup> are added together).*
  - *Employment: 11 FTE jobs (leading to a combined total of 36 FTE jobs for Eilean Siar when the matched respondents and original respondents<sup>31</sup> are added together).*
- In summary, taking the results from the 34 business able to quantify the value of Gaelic to their business and the results from the 17 businesses included in the matching process together, the **turnover attributed to the impact of Gaelic for these 51 businesses/enterprises is around £5.6 million.**

<sup>30</sup> This excludes the turnover and employment of key Gaelic organisations that are reliant on public sector support, which would substantially increase this figure of £3.1 million towards £15 million.

<sup>31</sup> This excludes the turnover and employment of key Gaelic organisations that are reliant on public sector support, which would markedly increase this figure of 36 FTE jobs towards 65 FTE jobs.

- In general, for many businesses there are both **practical and conceptual difficulties in attempting to provide any quantitative assessment of the value of Gaelic to their business.**
- Given the implications of this for this research consideration can be given to various actions to address these issues: (i) develop **processes through which additional primary data can be collected** from businesses that use Gaelic; (ii) develop **support processes/systems** through which businesses can develop and implement ways to measure the value of Gaelic; (iii) **educate and inform businesses** about the benefits to them (and the general benefits) of being able to quantify the value of Gaelic; (iv) **systematise the collection of relevant data from businesses**; (v) **make use of additional data due to be released in the future from the 2011 Census**, allowing a better understanding of the role of Gaelic as well as informing how the value of Gaelic can be quantified in a more robust and systematic way.
- An assessment of the potential economic value to the wider economy of Gaelic as an asset was carried out, **based on a number of key assumptions and caveats.** The analysis combined the relevant survey results with data from the 2011 Census about Gaelic ability, and also with data from the Scottish Government about the size of the Growth Sectors.
- The key assumptions and caveats underpinning this assessment were:
  - *A focus only on three key sectors where Gaelic is recognised as being used as an asset: the **creative industries; tourism (including heritage); and food and drink.***
  - *Using the primary research findings from those able to quantify the value of Gaelic as an asset to provide an **average (34.6%) and median (20%) percentage value of turnover that businesses attribute to Gaelic** and applying this to the wider economy.*
  - *In the absence of other suitable evidence about the scale of use (i.e. the number of businesses in the wider population that do use Gaelic as an asset but that did not respond to the survey or engage in the primary research elements of this study) the most recently released data from the 2011 Census about Gaelic language skills at the local authority level has been used as a **proxy measure to estimate and appropriately weight the potential scale of the value of Gaelic as an economic asset.***
- It should be acknowledged that this **approach is effectively underpinned by a rationale that assesses what the value of Gaelic would be if the results of the survey were replicated across the key sectors in the economy where Gaelic is recognised as an asset**, using the scale of Gaelic ability in each area as a weighting. Therefore, the **results below should be regarded as giving an indication of what the benefits of Gaelic as an asset could be to Scotland if the survey results were replicated across the wider economy.**
- Adopting this approach, and applying it to Growth Sector statistics for 2011 (the most recently available data) allows an estimate of turnover to be developed for the three Growth Sectors – Creative Industries (including digital), Food and Drink (excluding agriculture) and Sustainable Tourism (Tourism related industries). The results show that in total, the **potential economic value of Gaelic as an asset to the Scottish economy could be in the region of between £81.6 million and £148.5 million.**

## Prìomh Thoraidhean – Roinn 6

- Bha an rannsachadh ag amas air cainneachadh a dhèanamh air Gàidhlig mar so-mhaoin; **chan eil na toraidhean, ge-tà, a' cur an cèill ach cuid de dh'fheartan a thaobh an luach a ghabhas** a chainneachadh de Ghàidhlig mar so-mhaoin eaconamach, agus **cha bu chòir na toraidhean fhaicinn mar chuimseach no mar riochdachadh den eaconamaidh nas fharsainge.**
- Ged a thuir 70% de na gnothachasan san t-suirbhidh gu bheil cleachdadh na Gàidhlig a' riochdachadh so-mhaoin dhan phrìomh ghnìomh den gnothachas/iomairt aca, chan eil e comasach dhan **mhòr-chuid de na gnothachasan sin tuairmsean a rèir meud a thoirt seachad a den seo.**
- Chaidh aig timcheall air **aon-trian de na gnothachasan a tha a' measadh Gàidhlig mar so-mhaoin air tomhas air choireigin a thoirt air luach na Gàidhlig dhan gnothachas**, agus tha anailis dhen dàta a fhuair (a' fàgail nam prìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich a-mach às an dàta gus leigeil leis an anailis fòcas a chumail air gnothachasan san raon phrìobhaidich) a' sealltainn, airson **na 34 iomairtean sin, bha an teachd-a-steach a bhathar dhen bheachd a bha a' tighinn bho bhuidh na Gàidhlig faisg air £4 millean.** Còmhla ris a seo, (agus a-rithist a' fàgail nam prìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich a-mach às an dàta gus leigeil leis an anailis fòcas a chumail air gnothachasan san raon phrìobhaidich), bha an **àrdachadh den àireamh dhaoine a bha a' cosnadh a bhathar dhen bheachd a bha a' tighinn bho bhuidh na Gàidhlig airson na 18 gnothachasan a b' urrainn seo a thomhas aig 47 obraichean ionann is làn-ùine (FTE).**
- Gu h-iomlan, tha na feartan a leanas aig na gnothachasan dham bheil a' Ghàidhlig na so-mhaoin agus aig a bheil an comas luach na Gàidhlig dhan iomairt: a chainneachadh tha iad stèidhte taobh a-staigh **Eilean Siar no Gàidhealtachd**, tha iad ag obrachadh ann an gnìomhachsan cruthachail is cultarail, agus tha iad nam meanbh-ghothachasan.
- Tha dàrna ìre de dh'anailis air **pròiseas maidsidh** a chleachdadh tro bheil gnothachasan, a tha ag aithneachadh Gàidhlig mar so-mhaoin ach aig nach eil an comas tomhas den luach a thoirt seachad, air am maidseadh le gnothachasan is urrainn do luachan a thabhann air stèidh cùis-thar-chùis. Airson am maidseadh as fheàrr a lorg, bha **am pròiseas a' sireadh ri maidseadh a dhèanamh mu choinneamh ceithir slatan-tomhais** – i.e. a' maidseadh gnothachasan eadar an dà bhuidhinn stèidhte air: aithne do Ghàidhlig mar so-mhaoin, làthair cruinn-eòlach, raon, agus meud gnothachais.
- A' cuimseachadh air na 22 a fhreagair a bha a' comharrachadh Gàidhlig mar so-mhaoin, cha robh e comasach dhuinn an luach a chainneachadh (gach aon stèidhte anns na h-Eileanan an Iar), tha pròiseas maidsidh a' ciallachadh gun gabh na tuairmsean a leanas an dèanamh (stèidhte air 17 gnothachsan oir bha còig gnothachasan ann aig nach robh maidseadh san aon raon):

- *Teachd-a-steach de £1.7 millean (a tha na phàirt de dh'iomlan de £3.1 millean airson nan Eilean Siar le bhith a' gabhail ris na 17 luchd-freagairt eile còmhla ris an luchd-freagairt tùsail)*<sup>32</sup>.
- *Cosnadh: 11 obraichean FTE (a tha mar phàirt de dh'iomlan de 36 obraichean FTE le bhith a' gabhail ris na 17 luchd-freagairt eile còmhla ris an luchd-freagairt tùsail)*<sup>33</sup>.
- Gu h-aithghearr, a' gabhail na toraidhean bho na 34 iomairtean aig a bheil comas luach na Gàidhlig dhan ghnòthachas aca a chainneachadh agus na toraidhean bho na 17 iomairtean sa phròiseas maidsidh còmhla, tha an **teachd-a-steach a tha air aithneachadh mar bhuidh na Gàidhlig airson na 51 gnòthachasan/iomairtean timcheall air £5.6 millean.**
- San fharsaingeachd, airson mòra ghnòthachasan tha an dà chuid **duilgheadasan practaigeach agus bun-bheachdail ann a thaobh a bhith a' feuchainn ri measadh a ghabhas a chainneachadh a dhèanamh air luach na Gàidhlig dhan ghnòthachas aca.**
- Leis na builean a th' anns na toraidhean seo airson an rannsachaidh, faodar beachdachadh air diofar ghnìomhan gus fuasgadh fhaighinn air na duilgheadasan (i) **pròiseasan a chur air bhonn gus an gabh prìomh dhàta a bharrachd a thionail** bho ghnòthachasan a tha a' cleachdadh na Gàidhlig; (ii) **pròiseasan/siostaman taice** a chur air bhonn gus stiùireadh a thabhann do ghnòthachasan air mar a chuireas iad air bhonn is a chleachdas iad dòighean air luach na Gàidhlig a thomhas; (iii) **gnòthachasan fhoghlamachadh agus fiosrachadh a thoirt dhaibh** mu na buannachdan a th' ann dhaibhsan (agus na buannachdan san fharsaingeachd) nam biodh comas aca luach na Gàidhlig a chainneachadh; (iv) **an cruinneachadh de dhàta iomchaidh a thathar a tionail bho ghnòthachasan eagarachadh**; (v) **feum a dhèanamh de dhàta a bharrachd a tha ri sgaoleadh san àm ri teachd bhon Chunntas-sluaigh 2011**, a' tabhann tuigse nas fheàrr air dreuchd na Gàidhlig cho math ri bhith a' toirt fiosrachadh air mar a ghabhas luach na Gàidhlig a chainneachadh ann an dòigh nas làidire agus nas eagarach.
- Chaidh measadh a dhèanamh air an **luach eaconamach comasach dhan eaconamaidh nas fharsainge de Ghàidhlig mar so-mhaoin, stèidhte air grunn de phrìomh bharailean is chùnnraidhean.** Thug an anailis còmhla na toraidhean iomchaidh bhon t-suirbhidh le dàta bhon chunntas-sluaigh 2011 mu chomasan Gàidhlig, agus cuideachd le dàta bho Riaghaltas na h-Alba mu mheud na Roinnean Fàis.
- B' iad na prìomh bharailean is chùnnraidhean a bha nam bun-stèidh air a' mheasadh seo:
- *Fòcas air trì prìomh roinnean a-mhàin far a bheil aithne air a thoirt dhan Ghàidhlig air a cleachdadh mar so-mhaoin: na **gnìomhachasan cruthachail; turasachd (a' gabhail a-steach dualchas); agus biadh is deoch.***

<sup>32</sup> Tha seo a' fàgail às an teachd-a-steach agus fastadh de phrìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich, a chuireadh am figear seo de £3.1 millean suas gu mòr, gu suas ri £15 millean.

<sup>33</sup> Tha seo a' fàgail às an teachd-a-steach agus fastadh de phrìomh bhuidhnean Gàidhlig a tha an urra ri taic bhon raon phoblaich, a chuireadh am figear seo de 36 obraichean FTE suas gu mòr, gu suas ri 65 obraichean FTE.



- *A' cleachdadh nam prìomh thoraidhean rannsachaidh bhon fheadhainn aig an robh comas luach na Gàidhlig mar so-mhaoin a chainneachadh airson **cuibheasachd (34.6%) agus àireamh meadhanail (20%) fhaighinn, fhuair luach sa cheud de luach teachd-a-steach a tha gnothachsan a' faighinn às leth na Gàidhlig agus a' cur seo an cèill dhan eaconamaidh nas fharsainge.***
- *Às aonais fianais iomchaidh eile mu thomhas cleachdaidh (i.e. an àireamh de ghnòthachsan sa mhòr-shluagh a tha a' cleachdadh Gàidhlig mar so-mhaoin ach nach do fhreagair an suirbhidh no nach do ghabh com-pàirt anns na prìomh eileamaidean rannsachaidh) chaidh an dàta a chaidh a sgaoileadh mu dheireadh bho Chunntas-sluaigh 2011 mu sgilean cànan aig ìre ùghdarras ionadail a chleachdadh mar **thomhas procsaidh gus tuairmse agus cuideam iomchaidh fhaighinn de sgèile chomhais luach na Gàidhlig mar so-mhaoin eaconamach.***
- *Bu chòir aithne a thoirt gu bheil an dòigh-obrach seo air a' stèidheachadh gu h-èifeachdach le ceann-fàth a tha a' measadh dè an luach a bhiodh aig a' Ghàidhlig nan deidheadh mac-samhail thoraidhean an t-suirbhidh fhaighinn thairis air na prìomh roinnean san eaconamaidh far a bheil a' Ghàidhlig air a faicinn mar so-mhaoin, a' cleachdadh sgèile de chomasan Gàidhlig anns gach raon mar chuibhreann. Mar sin, bu chòir coimhead air na toraidhean gu h-ìosal mar chomharra air dè na buannachdan a dh'fhaodadh a bhith an cois na Gàidhlig mar so-mhaoin nan deidheadh na h-aon toraidhean fhaighinn san t-suirbhidh thairis air an eaconamaidh san fharsaingeachd.*
- *Le bhith a' cleachdadh an dòigh-obrach seo, agus ga chur ri staitistig Roinn Fàis airson 2011 (an dàta as ùire a tha ri fhaighinn), tha comas ann teachd-a-steach a thuiarmse gus a leasachadh airson na trì Roinnean Fàis – Gnìomhachsan Cruthachail (a' gabhail a-steach digiteach), Biadh is Deoch (às aonais àiteachais) agus Turasachd Sheasmhach (gnìomhachsan co-cheangailte ri turasachd). Tha na toraidhean a' sealltainn gum faodadh gu bheil, gu h-iomlan, **an luach eaconamach comasach aig Gàidhlig mar so-mhaoin do dh'eaconamaidh na h-Alba eadar £81.6 millean agus £148.5 millean.***

## 7. LOOKING FORWARD: ENHANCING THE USE OF GAELIC AS AN ASSET

### Introduction

The previous sections of the report have considered the current use of Gaelic as an asset, identifying how and where Gaelic is used, presented specific examples of businesses and organisations where Gaelic is used as an asset, assessed the inter-relationships between Gaelic development and economic and social development, and sought to quantify the value of Gaelic as an asset. This section builds on these previous sections and looks at the potential and opportunity around the economic and social value of Gaelic as an asset.

The section identifies both opportunities and challenges around using Gaelic to enhance and add value to businesses and enterprises, focusing on the extent to which businesses and enterprises believe there are additional opportunities around using Gaelic as an asset.

It is structured around four main issues – **assessing the potential** for such opportunities, **identifying where** these opportunities may exist, **considering the challenges and barriers** to any opportunities, and **identifying the potential impacts and benefits** of realising any such opportunities around the potential to enhance the use of Gaelic, and therefore the economic and social value of Gaelic as an asset.

### Demand for Gaelic Goods and Services

In considering the potential and opportunities around Gaelic, it is worth revisiting the discussion about the demand for Gaelic goods and services from Section 2.

The last major study by Chalmers and Sproull (2006) on the demand for Gaelic Arts (interpreted in the widest sense) examined changes over a ten year period in the factors that promoted, or in some cases constrained, the wish of consumers to purchase Gaelic artistic goods and services (or in the case of events, to take part in them).

Although Chalmers and Sproull's comprehensive survey primarily dealt with the arts, it would **suggest a notable level of untapped demand for Gaelic goods and services** in general, constrained more by availability rather than factors such as consumers' Gaelic fluency. This suggests that a target market, particularly for artistic goods, but not limited to that market, should not be seen as restricted to those who consider themselves as Gaelic speakers.

The recent viewing figures for BBC ALBA would also tend to back up this general conclusion, and – linked to the increasing goodwill, mentioned early in Section 2, offered by the general population (whether from Gaelic speakers or not) towards the language and culture – **suggests that sectors such as Gaelic arts, music, heritage and indeed tourism are areas for increasing possibilities, and of increasing potential**, given the growing prominence of the language in the wake of Gaelic Language Plans, Gaelic Medium Education, Gaelic media, and other initiatives.

### Opportunities for enhancing the use of Gaelic

All survey respondents were asked whether there were opportunities to make (more) use of Gaelic in the business/organisation in ways that would enhance the business, enterprise or organisation.

This question was asked both of those who had reported that Gaelic was currently an asset for the business, and also of those who did not regard Gaelic as an asset, and the results show a divergence of opinion between current users and non-users/potential users of Gaelic as an asset.

For those reporting that Gaelic is already an asset, (Table 7.1 below), almost 60% believe there are additional opportunities to make more use of Gaelic in ways that would enhance the business.

For those who stated that Gaelic was not an asset (Table 7.2), only 11% believe there are opportunities to make use of Gaelic in their business/enterprise in ways that would enhance the business, with more than three-quarters (76%) stating that they did not think there were opportunities to make use of Gaelic in their business/enterprise in ways that would enhance the business.

This suggests that there are clearly two contrasting cohorts of businesses – the **majority of those businesses that *already regard Gaelic as an asset*, also see additional opportunities for it to be used to enhance their business**, whilst (conversely) the **majority of those that *do not currently regard Gaelic as an asset*, do not see any opportunities to make use of Gaelic to enhance the business**.

**TABLE 7.1: Are there additional opportunities to make more use of Gaelic in your business/enterprise in ways that would enhance your business?**

	Response Percent	Response Count
Yes	59.0%	46
No	15.4%	12
Don't know	25.6%	20

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=78) – question only asked of those that had previously stated that Gaelic was an asset to the business

**TABLE 7.2: Do you believe there could be opportunities to make use of Gaelic in your business/enterprise in ways that would enhance your business?**

	Response Percent	Response Count
Yes	10.8%	4
No	75.7%	28
Don't know	13.5%	5

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=37) – question only asked of those that had previously stated that Gaelic was **not** an asset to the business

Assessing the type of businesses that believe there are opportunities to make more use of Gaelic to enhance the business, there are some key sectors that are more likely to recognise there are opportunities – businesses in the creative industries, education and learning, heritage and tourism are predominant in this group compared to the proportion of overall respondents from these sectors.

This suggests that **opportunities to make more use of Gaelic to enhance businesses is most likely to be *recognised* in businesses that already regard Gaelic as an asset, and in businesses in the creative industries, education and learning, heritage and tourism sectors.**

Overall, these findings suggest that the dissemination of good practice examples about the benefits of using Gaelic as an asset will be an important element of information sharing and communication to help develop a wider appreciation of the opportunities, especially for those businesses that do not currently see any opportunities to use Gaelic as an asset in their business.

For community groups and organisations, Table 7.3 shows a different pattern of responses. With the exception of a small number of respondents who do not think there are untapped opportunities for the organisation to make more/more effective use of Gaelic, the respondents are almost equally split between **those that think there are additional opportunities (44%), and those that do not know if there are untapped opportunities (42%).**

In terms of the relationship between those already regarding Gaelic as an asset and recognising additional opportunities, the same association that is present in the businesses also exists for community groups and organisations – where **those that currently regard Gaelic as an asset are more likely to also see future opportunities for using Gaelic.**

**TABLE 7.3: Are there any untapped opportunities for your organisation to make more – and more effective – use of Gaelic in your organisation and through its activities?**

	Response Percent	Response Count
Yes	44.4%	20
No	13.3%	6
Don't know	42.2%	19

**Source:** Gaelic as an Asset, Community Survey, 2013 (n=45)

For community organisations, there is no discernable pattern in terms of the characteristics (sectorally and geographically) within those that see more opportunities for using Gaelic compared to those that do not know if there are additional opportunities.

For those business and community organisations that do recognise there are potential opportunities to make more use of Gaelic to enhance the business or organisation, a number of themes and specific areas emerge:

On a **sectoral** basis, analysis of the primary research findings suggests that the main opportunities reside within the key sectors where Gaelic is already being used as an asset (see Sections 3 and 4) – namely, the **creative industries, tourism, education and learning, heritage, and community development.**

Within this, many consultees regard **tourism** and the various opportunities within this sector to be one of the main areas where there is strong potential to enhance and develop the role of Gaelic as an economic asset. This relates to opportunities where learning Gaelic (e.g. Gaelic language immersion courses) can be a joint tourism and education/learning opportunity (for Gaelic speakers/those wanting to learn Gaelic), as well as opportunities where the use of Gaelic can enhance and differentiate the tourism offer in particular areas, recognising the cultural, natural and historic heritage of particular places and adding distinctiveness.

As such, tourism opportunities can relate to two distinct markets (as discussed in Section 2 of this report) – a Gaelic speaking/learning market (‘internal Gaelic tourism’ as explained in Section 2), and also a more general (national/international) market where the role of Gaelic is about enhancing the distinctiveness, differentiation, and the appeal to tourists of visiting specific locations (especially island locations) within Scotland (‘volume market’ as explained in Section 2). Recent research commissioned by HIE (Tourism Intelligence Scotland, 2013) supports this potential around Gaelic tourism, having found that ‘visitor research tells us that over 50 per cent of visitors interviewed were either very or fairly interested in our Gaelic language’<sup>34</sup>.

Based on the results from the primary research for this study, there seems to be less of a consensus around the opportunities for Gaelic in relation to **food and drink** – with other factors being given more prominence, or being recognised as more important (e.g. provenance, quality, etc.). The exception to this, notwithstanding some of the issues set out in Section 4, relates to Gaelic’s role in relation to the Scotch Whisky industry.

Within the **creative industries**, opportunities relate to the further development of the wide range of artistic, drama, literature, music and events and festivals related activity currently taking place through businesses and organisations – both those that communicate and express themselves (either mainly or exclusively) in Gaelic, and those for whom Gaelic is used as an enhancement or a feature. Some of these opportunities therefore also link to potential around tourism, and the economic potential this provides, as well as more **community-focused opportunities** where the use of Gaelic helps support the language development as well as community and social development in these areas.

Many see the role of **education and learning** as being critical to the future development opportunities around Gaelic as an economic and social asset, and also the general language development of Gaelic. This relates to supporting the development of Gaelic through increasing the number of fluent Gaelic speakers/literates (through education and learning – i.e. Gaelic Medium Education, Gaelic adult learner courses, etc.), and as a result supporting the development of the Gaelic-speaking/literate pool of workers - thereby helping to address some of the general and specific challenges and barriers set out later in this section about enhancing the role of Gaelic as an economic and social asset.

Whilst these sectors have been identified as the main areas of opportunity, Gaelic is also appreciated in other sectors as well – as set out in Sections 3 and 4 of this report.

### Barriers and Challenges

One of the major challenges around enhancing the use of Gaelic as an asset (which is related more to the wider economic development and regeneration of the traditionally Gaelic speaking areas) relates to **job and employment opportunities**, especially for young people.

The lack of such opportunities is recognised as a major challenge for these fragile economic areas, and as such, the lack of these opportunities impact upon the potential around Gaelic – in terms of Gaelic development (of the language itself) and also the potential opportunities around Gaelic in relation to its role in economic development. If opportunities do not exist for young people to stay in these areas, or return to these areas whilst still economically active, this will impact on the ongoing regeneration of Gaelic, which in turn will reduce the potential of Gaelic as an economic asset.

<sup>34</sup> <http://www.tourism-intelligence.co.uk/develop-your-business/presentations/gaelic-tourism>

A main challenge around job and employment opportunities specific to Gaelic relates to the creation of jobs and career paths. As one consultee noted: *“The next step has to be more private enterprise engagement with Gaelic... if there is to be a significant increase in Gaelic-related job opportunities”* strongly echoing the findings from the Hecla 2008 study about the Gaelic labour market mentioned in Section 2.

Numerous business and community consultees strongly advocate the importance of job creation in reinforcing the economic future of Gaelic, although some consultees believe that in order to progress a career in Gaelic there is a need to (eventually) be located on the mainland, potentially within Glasgow/Edinburgh. In addition, some interviewees and focus group attendees noted that there are a lack of opportunities for career progression within Gaelic jobs (as well as differential returns to having Gaelic across different sectors and different geographies), and therefore there is a need to support opportunities for progression and development.

Another major issue relates to general **capacity and resources** of businesses (and community organisations). When asked what the main challenges or barriers that limit the ability of businesses to increase the use of Gaelic, issues around capacity (staff ability and time), as well as resources were identified by many businesses.

This includes the limited **capacity of core staff**, a lack of volunteers (for community organisations and social enterprises), and access to funding (from external sources) to develop ideas and projects, as well as the prohibitive costs relating to developing the role of Gaelic within the business:

*“Staff resources – competence in using Gaelic in a professional environment.  
At an individual level, awareness of Gaelic and its relevance to the organisation”.*

*“Lack of time to provide all text bilingually and ensure its accuracy”.*

*“Lack of volunteers, staff and time”.*

*“Funding. (Lack of) Job security. Lack of able population. Disproportionate effort required to access and administer relatively small pots of money”.*

*“The continual scramble for funding which leaves the volunteers disheartened”.*

*“Awareness of what opportunities are available [would] need to take time away from existing work relationships (in English) to actively search for Gaelic opportunities”.*

An additional barrier and challenge that businesses see themselves facing in terms of increasing the prominence of Gaelic in their business are labour force issues, relating to **the existing (lack of) Gaelic knowledge and expertise** within the business or organisation. A lack of Gaelic (i.e. of Gaelic speakers and/or Gaelic literates) is a well-recognised barrier by many businesses, and can manifest itself in a variety of different ways for businesses.

First, the **lack of Gaelic speakers/literates is recognised as a barrier both for the supply side** (i.e. within the businesses producing the goods and services) **and also on the demand side** (i.e. the consumers who would demand such goods and services).

*“Lack of fluent Gaelic speakers both to produce and consume materials”.*

*“That we can’t get the young people with the Gaelic skills we need”.*

Second, this also relates to Gaelic language skills generally, and more specifically, a **lack of Gaelic speakers with the relevant, specific skills to carry out particular jobs/fulfil particular roles** within the business.

*“The number of Gaelic speakers and particularly those who are appropriately qualified within the sector”.*

*“Lack of Gaelic speaking staff with the right skills. Lack of support from Government to help businesses that have opportunities to offer Gaelic speakers employment. Gaelic further education system is limited in the choices offered”.*

*“Normally it’s very difficult due to the lack of Gaelic speakers. When we put jobs up we often don’t get Gaelic speakers locally applying. If we did it would be so good for us”.*

Third, access to businesses or individuals with relevant Gaelic skills and expertise outside of the business/organisation is also a barrier. Commonly identified specific areas relate to **Gaelic tutors, translators and interpreters** – where it is well recognised that there is both an **excess demand** (lack of sufficient availability of such skills) for these services, and also the fact that **accessing such skills can be expensive** for businesses.

A commonly cited challenge for the development of Gaelic as an asset for businesses and organisations also relates to the various **cultural barriers and issues**. This can relate to aspects including a **lack of confidence** and lack of pride in the language from native speakers (although consultees note that this is improving in recent times), a **resistance to change** by some businesses and public sector support agencies and organisations, the **lack of priority and support given to Gaelic** by mainstream public sector agencies, a **lack of awareness** amongst some staff within businesses and organisations about the role and potential contribution of Gaelic, perceived wider **attitudes towards Gaelic** (‘hostility’, ‘suspicion’, ‘negativity’), as well as a lack of confidence, and perspectives about, and attitudes to Gaelic from some young people (‘not cool’). Other cultural barriers can include **concerns about ‘tokenism’** in the use of Gaelic (see Section 2), and also the concerns (set out in the early part of Section 5) about the **narrow treatment of Gaelic as an economic asset**.

Whilst it is recognised that there has been improvements around some of this in recent years, for the reasons identified in Section 2 and Section 5 (i.e. various activities that have supported the normalisation of the language, the growth in Gaelic Medium Education, Gaelic media, the 2005 Gaelic Language Act, as well as the fact that there is growing recognition about the range of Gaelic-related employment opportunities, and that more recent public opinion surveys provide evidence of substantial feelings of goodwill towards Gaelic) many consultees still recognise that there are a number of cultural barriers and challenges around the development and use of Gaelic, especially as an economic asset as expressed in the following quotes:

*“There is some hostility and suspicion (among the general public) of the use of Gaelic so that sometimes this negative view can put some companies off making a bigger deal of their use of the language”.*

*“Even native speakers can’t be forced to use it and if they have no confidence/pride in the language there is nothing to be done”.*

*“Lack of imagination, and funding being made available, on the part of the local authorities. Resistance to change and doing things in a different way – Lack of priority given to Gaelic development within local authorities”.*

*“Its use and promotion is controversial – would we be better translating our signs into other languages”.*

*“A lack of awareness among... staff about the importance of Gaelic”.*

### Impacts and Benefits of Realising Opportunities

When asked to identify the additional benefits and impacts that could be realised through the various opportunities, a number of common areas of benefit – economically, socially and also in terms of supporting the wider development of Gaelic – were noted.

These include **profile/awareness benefits** to the business, more **direct business impacts** (turnover, sales, customers, markets, etc.), **language development benefits** (including supporting and enhancing the normalisation of the language) and finally, the **mutually beneficial dynamic** between business and Gaelic development that would provide benefits to both economic and community development and Gaelic development.

In terms of the **social value** of Gaelic, the primary research has highlighted and emphasised the role of Gaelic in this regard, and has provided additional evidence that supports some of the key social dimensions of Gaelic identified in previous research – such as self-confidence (individually and at the community level); pride in the communities; attachment of people to their communities; and increases in Gaelic-related job opportunities.

In addition, the case studies include examples where the social value of Gaelic is both a key reason for using Gaelic by the enterprise or organisation and is also an outcome of using Gaelic by the organisation or business.

The community organisation survey also provides evidence of various aspects around the social value of Gaelic – with more than three-quarters of survey respondents stating that their use of Gaelic **increases the profile, awareness, use, appreciation, and social value of the language**.

In addition the majority of community organisation respondents agreed or strongly agreed that the use of Gaelic by community organisations **increased pride in local communities** (72%); increased the **attachment of people to their communities** (64%); and **increased Gaelic related job opportunities** (61%). Additionally, more than half of businesses that replied to the business survey believe that their use of Gaelic helps increase the social value of the language.

Realising the opportunities set out earlier in this section would allow the social value of Gaelic as an asset to be further enhanced and developed alongside the economic value.



### Key Findings – Section 7

- Whilst Chalmers and Sproull's (2006) comprehensive survey about the demand for Gaelic goods and services primarily dealt with the arts, it would **suggest a notable level of untapped demand for Gaelic goods and services** in general, constrained more by availability rather than factors such as consumers' Gaelic fluency. This suggests that a target market, particularly for artistic goods, but not limited to that market, should not be seen as restricted to those who consider themselves as Gaelic speakers.
- In terms of **additional opportunities to use Gaelic as an asset** – the majority of businesses that already regard Gaelic as an asset also see additional opportunities to enhance their business, whilst (conversely) the majority of those that do not currently regard Gaelic as an asset, do not see any opportunities to make use of Gaelic to enhance the business.
- Many consultees regard **tourism** and the various opportunities within this sector to be one of the main areas where there is strong potential to enhance and develop the role of Gaelic as an economic asset. Tourism opportunities can relate to two distinct markets **a Gaelic speaking/learning market** (i.e. 'internal Gaelic tourism'), and **also a more general (national/international) market where the role of Gaelic is about enhancing the distinctiveness, differentiation, and the appeal to tourists of visiting specific locations** (especially island locations) within Scotland (in effect a 'volume market').
- Within the **creative industries** opportunities relate to the further development of the wide range of artistic, drama, literature, music and events and festivals related activity currently taking place through businesses and organisations – both those that communicate and express themselves (either mainly or exclusively) in Gaelic, and those for whom Gaelic is used as an enhancement or a feature.
- The role of **education and learning** is regarded by many consultees as being critical to the future development opportunities around Gaelic as an economic and social asset, and also the general language development for Gaelic.

The key barriers and challenges in terms of realising these opportunities include:

- **The availability of job and employment opportunities**, especially for young people.
- The general **capacity and resources** of businesses (and community organisations) – limiting their ability to increase the use of Gaelic due to capacity issues (staff ability and time), as well as resources required to develop the role of Gaelic in the business.
- **The existing (lack of) Gaelic knowledge and expertise** within the business or organisation. A lack of Gaelic (i.e. of Gaelic speakers and/or Gaelic literates) is a well-recognised barrier by many businesses – on both the supply side and demand side. Also, a lack of Gaelic speakers with the relevant, specific skills for the business.
- **Cultural barriers and issues** relating to actual and perceived issues around confidence, resistance to change, lack of priority and support given to Gaelic, lack of awareness within businesses about the potential for Gaelic, concerns around tokenism and narrow treatment of Gaelic as an economic asset.

The anticipated impacts and benefits of realising these opportunities include:

- **Profile and awareness benefits to the business** (public awareness and credibility).
- **Direct economic impacts on business** (such as additional custom/increased turnover, increased audiences/visitors, creating new jobs).
- **Mutual benefits to business and community** (enhancing experiences; wider benefits from helping promote and sustain the language; better connectivity with the local area and its history; economies of scale; increased educational opportunities).
- **Normalisation of Gaelic/support for Gaelic** (increases in the quantity and quality of Gaelic exposure).

As such, the potential opportunities are anticipated to clearly benefit the individual businesses, as well as the communities where the businesses are located, and the wider language development for Gaelic – reinforcing and further evidencing the two-way inter-relationship between Gaelic and economic and social development mentioned previously in the report.

### Prìomh Thoraidhean – Roinn 7

- Far an robh an t-suirbhidh cuimseach aig Chalmers is Sproull (2006) mun iarrtas airson stuthan is seirbheisean Gàidhlig a' dèiligeadh gu h-àraid leis na h-ealain, tha e coltach gun robh ìre de dh'iarrtas ann nach deach a bhuileachadh airson stuthan is seirbheisean Gàidhlig san fharsaingeachd, air a chuingealachadh na bu mhotha air sgàth dìth faotainn na air sgàth nithean leithid fileantachd sa Ghàidhlig aig luchd-cleachdaidh. Tha seo ag innse dhuinn gur dòcha nach bu chòir margaidh air targaid, gu h-àraid airson stuthan ealain ach gun a bhith cuibhrichte ris a' mhargaidh sin, a bhith air fhaicinn air a chuingealachadh do dhaoine a tha gam meas fhèin mar luchd-labhairt na Gàidhlig.
- A thaobh cothroman a bharrachd airson Gàidhlig a chleachdadh mar so-mhaoin – tha a' mhòr-chuid a tha mar-thà a' meas Gàidhlig mar so-mhaoin cuideachd a' faicinn cothroman a bharrachd airson an gnothachasan adhartachadh, ged nach eil (air an làimh eile) a' mhòr-chuid nach eil an-dràsta a' meas Gàidhlig mar so-mhaoin a' faicinn cothroman airson feum a dhèanamh den Ghàidhlig airson an gnothachas adhartachadh.
- Tha mòran den fheadhainn sa cho-chomhairle a' meas turasachd, agus na diofar cothroman taobh a-staigh an raoin seo, mar aon de na prìomh raointean far a bheil comas làidir ann dreuchd na Gàidhlig mar so-mhaoin eaconamach is shòisealta adhartachadh is a leasachadh. Faodaidh cothroman san raon turasachd a bhith a' bualadh air dà mhargaidh shònraichte, margaidh luchd-labhairt/ionnsachaidh na Gàidhlig (i.e. turasachd Ghàidhlig a-staigh), agus cuideachd margaidh nas coitcheann (nàiseanta/eadar-nàiseanta) far a bheil dreuchd na Gàidhlig mu bhith ag adhartachadh cho sònraichte is eadar-dhealaichte sa tha i, agus an tarraing do luchd-turais gus tadhal air àiteachan sònraichte (gu h-àraid na h-eileanan) taobh a-staigh Alba (coltach ri 'margaidh lionaidh').
- Taobh a-staigh nan gnìomhachasan cruthachail, tha cothroman a' bualadh air leasachadh a bharrachd den raon farsaing de ghnìomhan ealain, dràma, litreachais, ciùil cho math ri tachartasan is fèisean a tha an-dràsta a' tachairt tro ghnòthachasan is bhuidhnean – an dà chuid iadsan a tha a' conaltradh agus gan cur fhèin an cèill tron Ghàidhlig (mar as trice no a-mhàin), agus iadsan dha bheil a' Ghàidhlig air a cleachdadh mar adhartachadh no mar fheairt.
- Tha an dreuchd aig foghlam is ionnsachadh air a mheas le mòran den fheadhainn sa cho-chomhairle mar dheanamach dha na cothroman leasachaidh san àm ri teachd co-cheangailte ri Gàidhlig mar so-mhaoin eaconamach is shòisealta, agus cuideachd a thaobh leasachadh cànan na Gàidhlig san fharsaingeachd.

Tha na prìomh chnapan-starra is dhùbhlain a thaobh a bhith a' buileachadh nan cothroman seo a' gabhail a-steach:

- Dìth cothroman obrach is cosnadh, gu h-àraid do dhaoine òga.
- An comas agus na goireasan aig gnothachasan (agus buidhnean coimhearsnachd) – a' cuibhreachadh an comas cleachdadh na Gàidhlig a mheudachadh air sgàth duilgheadasan comais (comasan is ùine luchd-obrach), cho math ri goireasan a tha dhìth gus dreuchd na Gàidhlig sa ghnòthachas a leasachadh.

- **Na th' ann an-dràsta (dìth) de dh'eòlas is ealantas a thaobh na Gàidhlig** taobh a-staigh a' ghnòthachais no na buidhne. Tha dìth Gàidhlig (i.e. de luchd-labhairt agus feadhainn a sgrìobhas i) na chnap-starra a tha aithnichte ann am mòran ghnòthachasan – air an dà chuid taobh an t-solair is taobh an iarrtais. Cuideachd, dìth luchd-labhairt leis na sgilean iomchaidh, sònraichte a tha dhìth airson a' ghnòthachais.
- Cnapan-starra is ceistean cultarail – a' bualadh air ceistean fìor is mothachail a thaobh misneachd, cur an aghaidh atharrachaidh, dìth prìomhachais is taic ga thoirt don Ghàidhlig, dìth mothachaidh taobh a-staigh ghnòthachasan mu chomasan airson na Gàidhlig, uallach mu chomharradh airson an adhbhair cheàrr agus làimhseachadh cùmhang de Ghàidhlig mar so-mhaoin eaconamach.

Tha na buaidhean is buannachdan a thathar a' sùileachadh nuair a thèid na cothroman sin a bhuileachadh a' gabhail a-steach:

- **Buannachdan aithne is mothachaidh dhan ghnòthachas** (mothachadh is so-chreidsinn poblach)
- **Buaidhean eaconamach dhìreach air ghnòthachas** (leithid barrachd cleachdaidh/teachd-a-steach nas motha, barrachd luchd-amhairc/luchd-tadhail, obraichean ùra air an cruthachadh).
- **Buannachdan a rèir do ghnòthachais is choimhearsnachd** (a' cur ri eòlasan; buannachdan nas fharsainge bho bhith a' cuideachadh le togail inbhe is cumail suas a' chànain; co-cheangal nas fheàrr leis an sgìre ionadail agus a chuid eachdraidh; econamaidhean sgèile; àrdachadh ann an cothroman foghlaim).
- **Àbhaisteachadh de Ghàidhlig/taic dhan Ghàidhlig** (meudachadh ann an uibhir is mathas nochdadh na Gàidhlig).

Leis a sin, thathar a' sùileachadh gum bi na cothroman comasach nam buannachd do ghnòthachasan fa leth, cho math ris na coimhearsnachdan far a bheil na ghnòthachasan stèidhte, agus an leasachadh cànanain san fharsangeachd airson Gàidhlig – a' daingneachadh agus mar fhianais a bharrachd den co-dhàimh dà-thaobhach eadar Gàidhlig agus leasachadh eaconamach is sòisealta mar a chaidh ainmeachadh roimhe.

## ANNEX 1: APPROACH AND METHOD FOR THE RESEARCH

This annex provides an explanation of the approach and method that was adopted for this research study: Economic and Social Value of Gaelic as an Asset.

### Approach

The overarching aim of this research was to **consider, evaluate and robustly evidence the current and potential use of Gaelic as an asset to the economy and society of the Highlands and Islands and Scotland as a whole.**

There were a number of **specific objectives** for the research to address – including:

- Articulating **how and where Gaelic is used** by businesses and social enterprises;
- Undertaking a **gap analysis** of where Gaelic could also potentially be used to add value;
- **Profiling** organisations using Gaelic to add value;
- Developing a suite of **indicators** to capture the size, scale and impact of Gaelic related activity;
- Identifying Gaelic related **opportunities**;
- Identifying **barriers and constraints** to growth and suggested solutions; and
- Making **recommendations** as to how investment might best be targeted to maximise the economic and social value of Gaelic.

Within this overarching aim and objectives, a unique remit of this study was upon the **tangible quantification of the social and economic value of Gaelic as an asset to the region and to Scotland.**

The approach adopted was based on previous research experience into the economic and social roles of Gaelic and also wider research experience of applying economic and social impact measurement approaches and methods to identifying the economic and social value of a wide range of intangible/hard to measure assets and interventions. Building on this previous experience, it was agreed that the **remit of the study could only be accomplished through a wide ranging approach that includes a combination of a ‘top down’** (i.e. secondary data driven model that uses official Census and economic statistics) and **‘bottom up’** (i.e. primary research driven approach that involves substantial consultation and data collection from those using Gaelic as an asset) **elements to the quantification of Gaelic as an asset.**

To address some of the key aims and objectives for this study (see above for a list of the aims and objectives) a ‘bottom up’ approach was required i.e. **direct primary research with those who do use/could use Gaelic as an asset.** This element was important for the identification of those that currently use (or could use) Gaelic as an asset, and also to understanding how it is used, and could further be used. It was also important for the quantification of Gaelic as an asset as this quantification needs to be fully informed by those using Gaelic as an asset.

It is recognised that there was insufficient (or a lack of) pre-existing evidence to address the aim of research study – about the current and potential use of Gaelic as an asset to the economy and society of the Highlands and Islands and Scotland as a whole. As such, the need for primary research cannot be under-stated. On reflection, this primary research has proved to be one of the key elements of the approach in terms of gathering evidence about Gaelic's role as an economic and social asset.

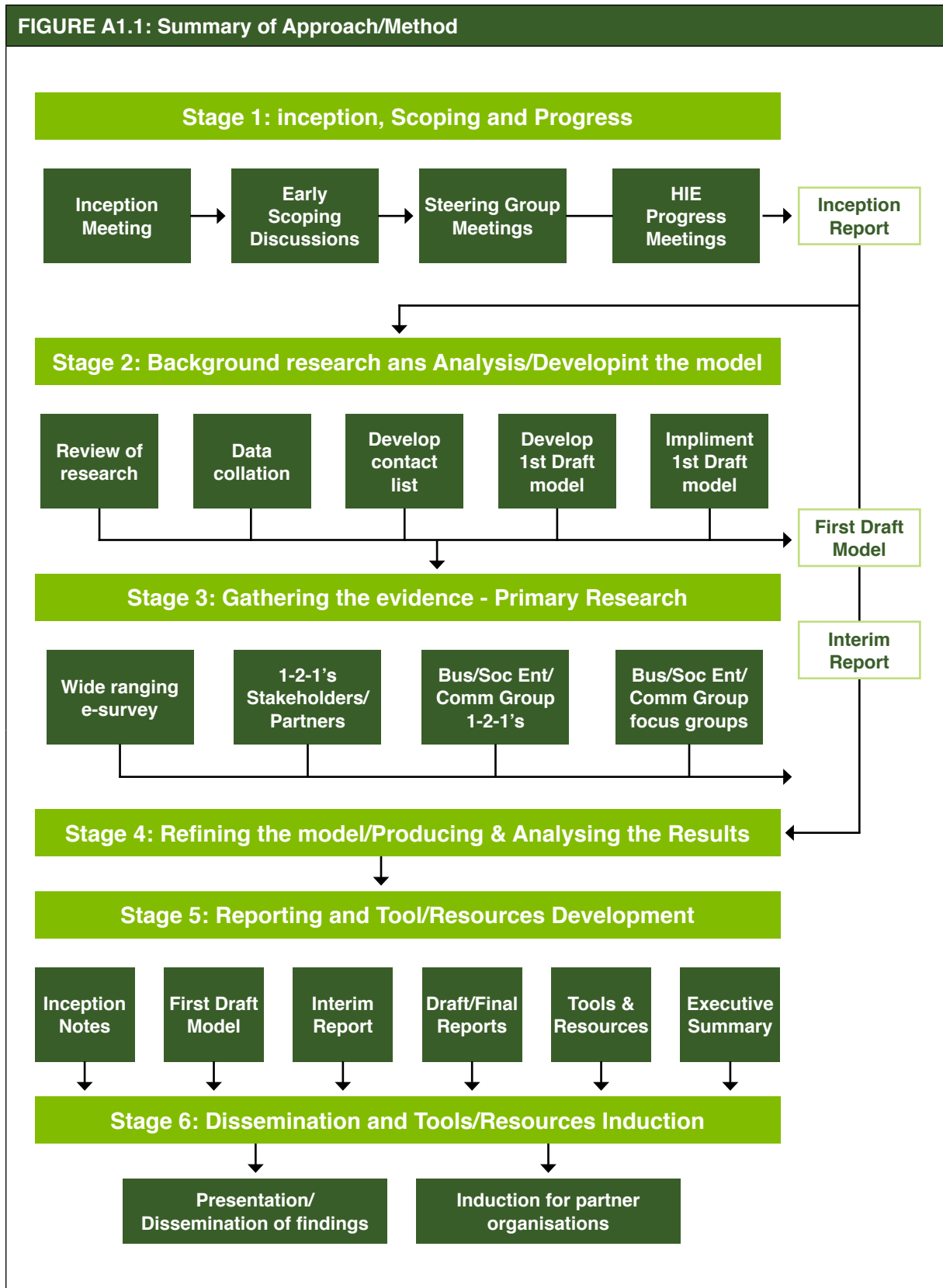
In conjunction, the **use of existing, secondary data as a 'top down' approach helped focus the remit** (geographically and sectorally) of the primary research. The top down approach is founded on the use of available, official statistics. The intention of adopting this approach is (1) that the work is transparent and able to draw strength from the quality assurance procedures of the Government Statistical Service and the United Kingdom Statistics Authority, and (2) that it should be replicable (relatively inexpensively) in the future.

Combining these two elements within the approach provided a number of benefits:

**Top down:** transparent, replicable, applicable to all Scotland (down to datazone level), enables time-series analysis (historic and future updating), quality assured data, enables comparative analysis, enables aggregation, enables generalisation of primary research results to wider population.

**Bottom up:** allows current **and** potential use of Gaelic as an asset to be identified and understood, allows in-depth understanding (barriers, constraints, opportunities) of the use of Gaelic as an asset, enables gap analysis to be achieved, enables quantification of Gaelic as an asset by those that use it, allows case studies/profiles to be developed.

An overview of our approach and method is set out in Figure A1.1 below, and shows how we will combine the top down (Stage 2) and bottom up (Stage 3) approaches into the analysis (Stage 4) and reporting (Stage 5).



The remainder of this Annex focuses on providing an overview of the ‘bottom up’ primary research elements of the method.

## Gathering the Evidence – Primary Research

As explained above, in order to identify the current and potential use of Gaelic as an asset to the economy and society, it was **necessary to carry out primary research with those businesses, social enterprises and community groups that already use (or could potentially use) Gaelic to add value to their transactions.**

The various strands of analysis from Stage 2 helped to identify the geographic areas (and the related economic sectors) where people with knowledge of Gaelic (i.e. concentration of Gaelic speakers) are located as well as identifying specific businesses, social enterprises and community groups that could be involved in the consultations, providing an initial starting point for the focus of the primary research. This helped to inform both the approach taken to the survey development and also the locations selected for the face to face consultation stages – both the one-to-one interviews, and also the focus groups – helping to ensure that those involved in the main elements of primary research provided appropriate coverage of organisation type, size, activity, sector, and geography.

The primary research took the form of four main areas of activity:

- **Two wide-ranging e-surveys** of firstly, **businesses and social enterprises** and secondly, **community groups and organisations** located in the relevant localities and relevant sectors of the economy.
- **One-to-one, face-to-face consultations with a range of key stakeholders and partners.** This included consultations with representatives from the project **Steering Group** as well as consultations with business **sector representatives** and associations to capture national, strategic/**policy** perspectives as well **industry and sector specific** perspectives on the role and value of Gaelic.
- **One-to-one, face-to-face consultations with a sample of businesses, social enterprises and community organisations and groups** currently using, or with the potential to use, Gaelic as an asset.
- **Face-to-face, focus group consultations with a sample of businesses, social enterprises and community organisations and groups** currently using, or with the potential to use, Gaelic as an asset.

## Surveys

The surveys were implemented as online surveys allowing respondents to complete it in their own time and submit the completed survey direct to the research team. The decision to use two separate surveys enabled the questions in each survey to be more appropriate to the respondent – allowing the business/enterprise survey to be more focused towards the economic value of Gaelic as an asset and the community group/organisation survey to be more focused towards the social/community value of Gaelic as an asset. Both of the surveys were available bilingually (in both Gaelic and English).



The use of the **e-survey approach had a number of benefits**, including: being more straightforward/efficient in terms of gathering contact details (compared to attempting to gather full address details); being easily incorporated into a ‘snowball’ approach to survey dissemination (due to the ease of (re)circulating by email); being easily distributed via numerous routes/mechanisms including social media, intermediaries, HIE and partners, promoted via local press etc. to help maximise awareness about the survey.

Whilst the original intention was for the development of a ‘master list’ of survey invitees by the research team (based on collecting and collating information from a wide range of sources – including data from HIE, the relevant local authorities, other partners, preparatory work done for this research study by Comunn na Gàidhlig as well as building on information from previous research and from consultations with partners), early discussions with Steering Group representatives identified that data protection issues would make the provision of information such as contact details difficult (or impossible) for a number of Steering Group organisations.

As a result of this issue, it was agreed that both direct invitations to complete, and general promotion and dissemination of, the survey would be carried out by the individual Steering Group members (with support from the research team). The help and support of the Steering Group members with this aspect was much appreciated. This ensured that data protection was not an issue, but did result in the survey dissemination process being carried out ‘one step removed’ from the research team – thereby making it difficult for the research team to know who had been directly invited to complete the survey (unless the Steering Group members were able to share this information, which only happened on a couple of occasions).

The surveys ran from August 2013 until late October/early November 2013, a longer timescale than initially planned, based on an agreement with the Steering Group to keep the surveys open for a longer timescale to allow additional responses to be submitted during the face-to-face elements of the primary research.

The extension to the timescale for the surveys also enabled those invited to the focus groups and interviews, but unable to attend, to be invited to engage in the research by completing the survey instead.

Throughout the time the surveys were open for responses, in addition to the direct invites sent out by the Steering Group, a range of general promotion routes were used by the Steering Group (and the research team) – including websites, e-newsletters, social media – including Twitter and Facebook, word of mouth, direct discussions with clients, etc. as well as being passed onto colleagues with a request for them to forward and disseminate the survey invitations on to others.

The table below (A1.1) summarises the final number of responses received.

<b>TABLE A1.1: Economic and Social Value of Gaelic as an Asset: Summary of Survey Replies</b>			
	<b>Number (start)</b>	<b>Number (completed)</b>	<b>Number replying to key question</b>
Business Survey - English	181	113	156
Business Survey - Gaelic	14	8	11
<b>Business Survey - TOTAL</b>	<b>195</b>	<b>121</b>	<b>167</b>
Community Survey - English	50	42	45
Community Survey - Gaelic	4	3	4
<b>Community Survey - TOTAL</b>	<b>54</b>	<b>45</b>	<b>49</b>
<b>TOTAL</b>	<b>249</b>	<b>166</b>	<b>216</b>

This shows the number of respondents that started each of the surveys, the number who completed each of the surveys, and also the number that answered at least one of the key questions in the surveys (about whether Gaelic represents an asset to their business/enterprise/organisation).

In order to try and make an assessment of the 'response rate' to the surveys (which is problematic given that the research team did not have direct information about which businesses, enterprises and community organisations received direct invitations to the survey due to the aforementioned data protection issues) each of the Steering Group representatives were asked to provide information on the number of direct invitations to the survey they sent out, as well as any additional promotion, publicity and awareness raising that was carried out to help generate survey responses.

In order to estimate a response rate, the number of direct invites that were sent out by individual steering group members has been used.

Information provided by the Steering Group indicated that more than 2,500 direct invitations were sent out. However, there is likely to be a number of **overlaps/duplications** in the send outs – i.e. the same business may have received a direct invite from, for example, both HIE and a local authority. As such, the number of separate businesses/ organisations that received a direct invite is likely to be less than the 2,500, but more than the highest single number sent out by one organisation (more than 1,500 were sent out to the businesses listed in the Outer Hebrides Business Directory). The proxy measure that was developed to assess the number of direct invites from the Steering Group that related to non-overlapping geographic areas (to ensure no double counting of invites took place). Taking this approach gives a total of 1,680.

Based on the above information, the table below summarises the estimated response rate for the surveys. Following the issues set out in the paragraph above, two estimates have been taken for the total number of direct invites – an upper limit of the total sum assuming that there were no overlaps/duplications in the direct send outs from different Steering Group members, and a lower limit where we have assumed overlaps/duplications except where geography makes it clear there would be no overlap.

The table below (Table A1.2) summarises the response rates on this basis, and shows that:

- The response rate in terms of those that **started** the survey is between **10% and 15%**.
- The response rate in terms of those that **completed** the survey is between **7% and 10%**.
- The response rate in terms of those that responded to the **key questions** about Gaelic as an asset is between **9% and 13%**.

<b>TABLE A1.2: Summary of Estimated Response Rates based on information received so far</b>		
<b>Response rates (assuming all 2,538 invites are to different people)</b>		
	<b>Number</b>	<b>Response Count</b>
Starters	249	9.8%
Completers	166	6.5%
Key Q	216	8.5%
<b>Response rates (using the non-overlapping geography estimate of 1,680)</b>		
	<b>Number</b>	<b>Response Count</b>
Starters	249	14.8%
Completers	166	9.9%
Key Q	216	12.9%

In summary, the response rate to the surveys is therefore of the scale that would be expected for an online survey such as this and is comparable with equivalent studies – focusing on the key question as the best measure of response, the response rate is estimated to be in the region of between 9% and 13%.

Examination of the survey responses did not reveal any apparent biases in the surveys in terms of the distribution of respondents, although, for the reasons above, there was not sufficient information about the survey recipients for the research team to fully assess the representative of the responses.

Additional information about the survey respondents is set out in the tables below, which show the geographic and sectoral breakdown of the business/enterprise survey respondents.

<b>Table A1.3: Summary of Business/Enterprise Survey Respondents by Local Authority</b>		
<b>Local Authority</b>	<b>Number of Responses</b>	<b>Percent of Responses</b>
Aberdeenshire	1	1%
Argyll & Bute	19	13%
East Ayrshire	1	1%
Edinburgh	8	5%
Eilean Siar	53	35%
Falkirk	1	1%
Glasgow City	9	6%
Highland	51	34%
Inverclyde	1	1%
Midlothian	1	1%
Moray	1	1%
Perth & Kinross	4	3%
Stirling	1	1%
West Dunbartonshire	1	1%
<b>Total</b>	<b>152</b>	<b>100%</b>

**Source:** Gaelic as an Asset, Business Survey, 2013 (n=152)

<b>Table A1.4: Summary of Business/Enterprise Survey Respondents by Industry</b>		
<b>Industry</b>	<b>Number of Responses</b>	<b>Percent of Responses</b>
A : Agriculture, forestry and fishing	6	4%
C : Manufacturing	21	14%
E : Water supply; sewerage, waste management and remediation activities	1	1%
F : Construction	1	1%
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	12	8%
H : Transportation and storage	3	2%
I : Accommodation and food service activities	11	7%
J : Information and communication	9	6%
L : Real estate activities	1	1%
M : Professional, scientific and technical activities	14	9%
N : Administrative and support service activities	3	2%
O : Public administration and defence; compulsory social security	5	3%
P : Education	9	6%
Q : Human health and social work activities	2	1%
R : Arts, entertainment and recreation	45	30%
S : Other service activities	7	5%
<b>Total</b>	<b>150</b>	<b>100%</b>
<b>Source:</b> Gaelic as an Asset, Business Survey, 2013 (n=150)		

In terms of geographic breakdown of survey respondents, Table A1.3 shows that the Eilean Siar (35% of respondents) and Highland (34% of respondents) represent the most common locations of respondents, followed by Argyll & Bute (13%), then Glasgow (6%) and Edinburgh (5%). This distribution suggests that the survey has generated proportionate levels of response from the key geographic areas, based on the patterns/concentrations of Gaelic across Scotland (see Section 2).

In terms of industrial sector representation, Table A1.4 show that 'Arts, entertainment and recreation' represents the most common sector (30%), followed by 'Manufacturing' which includes food and drink production and manufacturing (14%).

## Focus Groups and Interviews

In terms of the ordering of the primary research activity, the surveys were initiated first, and this allowed key information on the use/potential use of Gaelic as an asset to be gathered from a wide range of businesses, enterprises and organisations. The results of the survey (to the end of September) were then used, in conjunction with the findings from Stages 1 and 2 and the Steering Group consultations, to help identify the target consultees and focus group attendees for those elements of the primary research.

This use of the survey helped to **ensure that those selected/invited to be involved in the face-to-face consultations (one-to-one or group) represent an appropriate mix across a number of factors** including: organisation type, organisation size, sector, and geography. It also allowed the focus group and consultation invitees to include those that currently use Gaelic as an asset, and also those that do not (but could potentially) use Gaelic as an asset.

The full list of invitees for the focus groups and interviews was developed through an iterative process, initially based on consultations carried out with Steering Group members, feedback on an initial list developed in early August 2013, additional suggestions received at the Steering Group meeting in August 2013, and through direct requests to Steering Group members for further suggestions. All of this contributed to a long list of potential consultees.

This long list (of more than 550 suggestions) was 'cleaned' and tidied – the variance in the quality and the level of detail of the information provided led to this becoming a much more detailed and time-consuming task for the research team than was initially anticipated. For example, around half of the 550 suggestions received did not provide any explanation/reason for suggestion, around half did not include a contact person for the business/enterprise/organisation, and around half did not have contact details.

A final list of focus group and interview invitees was developed through a combination of the following actions:

- Consultations and discussions with HIE.
- Support from individual Steering Group members in providing additional information to help 'fill in the blanks' in terms of contact names and contact details.
- Specific advice and guidance from individual Steering Group members to help focus and narrow down the list to the correct scale.
- Finally, an assessment of survey respondents to identify any additional invitees from this source.

The finalised list worked on the assumption that not all invitees would be able to attend the focus groups/interviews – and deliberately included more than was required to cope with the anticipated proportion of invitees that would not be available on the specific date or would decline the invitation.

In terms of the balance between focus groups and interviews, the original intention was for 12 focus groups to be carried out in 12 different locations across Scotland, with the selection of geographic locations ensuring appropriate coverage of the relevant areas, in terms of covering key Gaelic areas/locations – both from a community perspective and economic perspective. This was thought to be a sufficient number of focus groups to cover all the relevant locations whilst also allowing sufficient resources to be dedicated to one-to-one interviews with an appropriate scale and distribution of businesses, social enterprises, and community organisations.

One interesting development as this stage of the primary research progressed was that, with 12 focus groups planned, the expectation was for around 30 one-to-one consultations to be carried out. Assuming six people attended each focus group, this would result in a total of just over 100 consultees from the focus groups and interviews combined.

Whilst this total number of consultees was more than achieved (the final total was 120 including Steering Group consultees), the majority of these ended up being in the form of one-to-one interviewees rather than focus group attendees. This shift was due in part (based on anecdotal evidence from invitees) on people being happier to be consulted on a one-to-one, private/confidential, basis rather than in a group – given the issues and topics being discussed. The fact that being consulted on a one-to-one basis typically took place at the consultees' place of work, whilst attending a focus group required more time for them to dedicate, in terms of travelling to and from the focus group venue was also thought to be a contributory factor in this shift.

The dates and locations of the focus groups are set out in the table below, with eleven rather than twelve focus groups taking place (one did not take place due to lack of availability of attendees on the specific date). The one-to-one interviews were conducted around the focus groups when appropriate (i.e. at times and days prior to/subsequent to the focus groups taking place) and were also carried out at other times and via other means (e.g. by telephone as well as face-to-face) where it was more convenient for the consultee to do so.

<b>TABLE A1.5: Summary of Focus Group Dates, Locations and Venues</b>		
<b>Dates</b>	<b>Location</b>	<b>Venue</b>
Friday 11th October	Edinburgh	Creative Scotland
Monday 14th October	Skye	Aros Centre, Portree
Tuesday 15th October	Inverness	Highlands & Islands Enterprise
Monday 21st October	North Uist	Taigh Chearsabhair, Lochmaddy
Tuesday 22nd October	Harris	Harris Hotel
Wednesday 23rd October	Lewis	MG ALBA, Stornoway
Tuesday 29th October	South Uist	Daliburgh School
Thursday 31st October	Oban	Corran Halls
Friday 1st November	Glasgow	Scottish Enterprise
Wednesday 6th November	Barra	Castlebay Community Hall
Thursday 7th November	Islay	Ionad Chaluim Chille Ile, Bowmore

A full list of the individuals who were consulted on a one-to-one basis, either face-to-face or via telephone interviews, as well as those who attended one of the eleven focus groups are listed in Annex 2.

Whilst it is unsurprising to find that those not currently using Gaelic as an asset were less likely to respond to the surveys, or agree to be interviewed, or attend one of the focus groups, efforts were made to ensure that, as far as possible, the views of representatives from this grouping were captured through the primary research.

## Summary

In total, the primary research consulted with, or received responses from, more than 300 businesses, enterprises and organisations – around two-thirds (more than 200) from the surveys, and more than one-third (120) from the focus groups and interviews.

Reflecting on this, the research team regard this as a satisfactory scale of consultation, and encapsulates an appropriate mix of consultees to provide the evidence base for this research study.

This primary research has achieved coverage of the key geographic locations, the key sectors (focusing on key sectors where previous research suggests Gaelic is used), and has covered both the economic and social dimensions of Gaelic as an asset.

As such, the evidence base developed through this primary research, in conjunction with the findings from previous research that has been reviewed, and from the ‘top down’ approach, ensures that the results and findings from this study can be regarded as robust.

However, this does not mean that the research is comprehensive, nor that it forms a census of all of those using Gaelic as an asset. The research has however achieved **good coverage**, and has **been able to construct an evidence base around Gaelic’s role as an asset, as well as develop a range of case study examples of businesses and organisations where Gaelic adds value and is used as an asset**. However, there is no doubt that there are many more examples not included/covered in this research where Gaelic is being used as an asset to add value to a transaction – social and/or economic.

This research has attempted to assess the role of Gaelic as an economic and social asset, and the specific remit of the research is acknowledged as being a **crucial first step in researching and evaluating this area of Gaelic development**. A key next step in furthering this area of research could be for the multi-partner Steering Group to direct efforts at addressing the gaps in the evidence base developed as part of this study to enhance the breadth and depth of the coverage – see Section 6 (Issues and Challenges with Quantifying the Value of Gaelic as an Asset) for consideration of some potential actions around this.

## ANNEX 2: LIST OF INTERVIEW CONSULTEES, FOCUS GROUP ATTENDEES, AND STEERING GROUP MEMBERS

### Steering Group Membership and Remit

This research study was overseen/managed by a multi-organisational Steering Group, supported by a sub-group (the Research Lead Group – RLG). The membership of both of these groups is set out below, along with the remit of the Steering Group.

The remit of the Steering Group was:

- Active participation in Steering Group meetings through general discussion/debate and monitoring of the various key milestones and outputs as the research progresses.
- Engage with DC Research regarding key issues/areas for the research to focus on.
- Active involvement with the production of any tools/resources associated with the research.
- Suggest/nominate invitees to attend focus groups.
- Promote the research within the Steering Group member's own organisation, community group or business, as appropriate.

### Members of the Steering Group

Organisation	Contact Name
Bòrd na Gàidhlig (RLG)	Peadar Morgan/Daibhidh Boag
SNH	Emily Edwards
Creative Scotland	Maggie Page
The Highland Council	Kenny Murray/Kenny MacInnes
CNES	Joe MacPhee
Argyll and Bute Council	Stephen Colligan
HIE (RLG)	Neil Ross
HIE (RLG)	Shona MacLellan
HIE (RLG)	Anne MacDonald
HIE (RLG)	Rachael McCormack
DC Research (and partners) (RLG)	Stephen Connolly + Research Team
Heriot-Watt Uni (RLG)	Mike Danson
CnaG	Donald MacNeil
CnaG	Calum Iain MacLeod
HIE	Anne MacAulay
HIE	Andrea McColl
HIE	Robert Muir
HIE	Martin Johnson
HIE	Kerrien Grant
HIE	Eleanor McNab
HIE	Peter Guthrie
HIE Moray	Leigh Shanks
NTS	Diarmid Hearn
Scottish Government	Douglas Ansdell
Loch Lomond and Trossachs & Cairngorms National Park Authorities	Stephanie Bungay
Historic Scotland	Kirsty MacDonald
Skills Development Scotland	Derek MacKenzie



The individuals who were consulted on a one-to-one basis, either face-to-face or via telephone interviews, as well as those who attended one of the eleven focus groups are listed in the table below.

Name of business/enterprise/ community group/individual	Contact Person Name	Type of Consultee
40 North Limited	Bruce Armitage	One-to-one
Acair	Agnes Rennie	One-to-one
Akerbelz	Michael Bauer	One-to-one
Amanda Millen	Amanda Millen	One-to-one
An Lanntair	Roddy Murray	One-to-one
An Radio / Uist radio	Neil Campbell	Focus group
Annasach Cèilidh Band	Colin Wilson	Focus group
Ariel Killick (street artist)	Ariel Killick	One-to-one
Aros	Donald MacDonald	One-to-one
Barra and Vatersay Agricultural Association	Sarah Maclean	One-to-one
BarraLive	Jane MacNeil	Focus group
Barratlantic	Christina MacNeil	One-to-one
BBC Scotland	Margaret Mary Murray	One-to-one
Berneray Community Association	Donald McDiarmid	Focus group
Bùth Bharraigh	Sarah Maclean	One-to-one
Cairngorm Brewery	Samantha Faircliff	One-to-one
Cànan	Vanessa Lopez	One-to-one
Caroline MacLeod	Caroline Campbell	One-to-one
Ceolas	Mary Schmoller	One-to-one
Co-chomunn Eirisgeidh	Catrina Scott	Focus group
Comann Eachdraidh Bheàrnaraigh	Andrew Ross	Focus group
Comhairle nan Leabhraichean	Rosemary Ward	One-to-one
Cothrom	Barbara Macdonald	Focus group
Culloden Battlefield Centre	Katy Boal	One-to-one
Deiseal Ltd	Daibhidh Grannd	One-to-one
Dunollie House	Jane Isaacson	Focus group
Edinburgh Book Festival	Nick Barley	One-to-one
Edinburgh University (Gaelic Officer)	Bria Mason	Focus group
Eriska Enterprises	Beppo Buchanan Smith	Focus group
Facal	Alasdair MacLeòid	One-to-one
Fèis Rois	Fiona Dalgetty	One-to-one
Fèisean nan Gàidheal	Arthur Cormack	One-to-one
Gearannan Black House Village	Iain MacArthur	Focus group
gearradh-mor	Annag Maclean	Focus group
Glasgow Life	Donald MacPhee	Focus group
Glasgow University	Fiona Dunn	Focus group
Glenedale Guest House	Rachael Whyte	Focus group
Graeme Ambrose	Graeme Ambrose	One-to-one
Guth Bharraigh	Mary Sinclair	Focus group
Harris Hotel	Sarah Scott	Focus group
Harris Tweed Authority	Lorna Macaulay	One-to-one
Harris Tweed Hebrides	Ian A Mackenzie	One-to-one

Name of business/enterprise/ community group/individual	Contact Person Name	Type of Consultee
HebCelt Festival	Caroline MacLennan	One-to-one
Hebridean Fudge	Gerry Porter	One-to-one
Hebridean Toffee	Karen and Gerry Porter	One-to-one
Holmasaig Gallery	Margarita Williams	One-to-one
Hootananny, Inverness	Steve Robertson	Focus group
Hotel Eilean Iarmain	Flora MacLean	Focus group
Ionad Chaluum Chille Ile	Catherine Johnston	Focus group
Ionad Chaluum Chille Ìle	Neil Woodrow	One-to-one
Iseabail MacTaggart	Iseabail MacTaggart	Focus group
Islands News & Advertiser	Susie MacAulay	Focus group
Islay & Jura Gaelic Initiative	Lynn MacDonald	Focus group
Islay & Jura Marketing Group	Jack Fleming	Focus group
Isle of Harris Knitwear	Mairi Fraser	One-to-one
Kilmartin House Museum	Bill Young	One-to-one
Langass Lodge/Hamarsay House	Amanda Leveson-Gower	Focus group
Loch Duart Salmon	Alan Balfour	Focus group
Lochboisdale Hotel	Karen and Calum MacAuley	One-to-one
MacQueens Removal & Storage	Graham MacQueen	Focus group
MacTV	Bill Morrison	One-to-one
Mark Wringe	Mark Wringe	One-to-one
MG ALBA - Stornoway	Neil Graham	One-to-one
MNE Media	Allan MacDonald	One-to-one
National Galleries of Scotland	Kathryn Farrell	Focus group
National Museum of Scotland	Evelyn Simpson	Focus group
National Trust for Scotland	Jo Anthony	One-to-one
National Trust for Scotland	Elaine Clark	One-to-one
National Trust for Scotland	Diarmid Hearn	Focus group
NUDC and Urachadh Uibhist	Uisdean Robertson	One-to-one
Outer Hebrides Commerce Group	Gail Robertson	One-to-one
Pamela Conacher	Pamela Conacher	One-to-one
Pernod Ricard (Chivas Brothers)	Nikki Burgess	One-to-one
Port Charlotte Hotel	Graham Allison	One-to-one
Praban na Linne distillery	Rosalyn MacLeod	One-to-one
Pròiseact Nan Ealan	Erica Morrison	One-to-one
Publishing Scotland/Foilseachadh Alba	Marion Sinclair	One-to-one
Ravenspoint/Islands Book Trust	John Randall	One-to-one
Ruairidh MacIlleathain	Ruairidh MacIlleathain	One-to-one
Sabhal Mòr Ostaig	Boyd Robertson	One-to-one
Scalpay Community representative		Focus group
Scotland Food and Drink	James Withers	One-to-one
Scottish Parliament (Gaelic Development Officer)	Alasdair MacCaluim	Focus group
Sealgar Ltd	Dòmhnall I Dòmhnallach	One-to-one
Sealladh	Morag Stiùbhart	One-to-one
Seallam, Harris	Bill & Chrissie Lawson	One-to-one
Seatrek Outer Hebrides	Murray Macleod	Focus group
Seumas MacArthur	Seumas MacArthur	Focus group

Name of business/enterprise/ community group/individual	Contact Person Name	Type of Consultee
Snàth handspun and handknits	Susan Campbell	One-to-one
Social Enterprise Academy	David Bryan	Focus group
Sound of Jura	Giles Perring	One-to-one
South Islay Development	Kirsten Laurie	Focus group
Stepping Stone Restaurant	Ann Quarm	Focus group
Storas Uibhist	Kirsty Campbell and Deirdre MacEachen	One-to-one
Strathclyde University	Mona Wilson	Focus group
Taigh Chearsabhaigh	Norman Macleod	One-to-one
Taigh na Teud Music Publishers	Alasdair Martin	Focus group
The Camanachd Association	Rachael Forbes	Focus group
Uisge Beatha nan Eilean	Peter Brown	One-to-one
Urachadh Uibhist	Ada Campbell	Focus group
VisitScotland	Alan MacKenzie	One-to-one
Watercolour Music	Mary Ann Kennedy	One-to-one
Wee Norrag, Inverness	Angela MacMillan	Focus group
Wild and Magic Islay	Rachel McNeil	One-to-one

### ANNEX 3: REFLECTIONS FROM THE RESEARCH TEAM

The research team wanted to take the opportunity to set out some of our reflections (as the team that carried out the project) about the research study.

**First**, it is important to clarify what this research study has attempted to achieve, and just as importantly, what it did not set out to achieve.

The overarching aim of this research (explained in more detail in Section 1 of the report) was to **consider, evaluate and robustly evidence the current and potential use of Gaelic as an asset to the economy and society of the Highlands and Islands and Scotland as a whole.**

Effectively, the research has attempted to assess the role of Gaelic as an economic and social asset. As such, this is very much an **initial, baseline study** which has sought to explore and assess the current (and potential) role of Gaelic as an asset economically and socially, and where possible to **quantify the value of Gaelic as an asset.**

It is also important to **clarify what this research has not attempted to do.** The specific remit is made clear in the following statements set out by the multi-partner Steering Group<sup>35</sup> at the outset of this research project:

*The research is not trying to capture the entire social and economic impact of Gaelic, it is seeking to illuminate the social and economic value of Gaelic where it is used as an asset and where it has the potential to be used as an asset.*

*The study quite uniquely focuses on organisations that use Gaelic as an asset to derive economic or social benefits. The research should highlight where Gaelic adds value to a transaction-social or economic, rather than where it costs the public purse. Much other research has already been undertaken to quantify public sector inputs and outcomes, which this study does not seek to replicate.*

This research has therefore not been about carrying out a full-scale economic impact assessment or cost-benefit-analysis of Gaelic on the Highlands and Islands and Scottish economy. It has focused on the remit set out and has **sought to highlight where Gaelic adds value to an economic or social transaction, including through the development of specific profiles and case studies** which are used in the report (Section 4) to illuminate the social and economic value that Gaelic provides.

**Second**, as is typical with such research studies, much has been learned along the way, both from a research perspective, but also relating to some of the current considerations around assessing the economic value of Gaelic as an asset.

An explanation and discussions about the approach and method adopted and the lessons learned is included earlier in the report annexes (Annex 1) and is summarised in Section 1 of the report. This includes some reflections on the overall method adopted – highlighting what worked well, and also the aspects from which some lessons can be learned.

<sup>35</sup> A multi-organisation Steering Group managed this research – see Annex 2 for more information.

Overall the approach adopted for the research was to engage directly and consult with those businesses, enterprises and community organisations that already use (or have the potential to use) Gaelic to add value to their offering, whether commercially or socially.

This involved the implementation of a programme of surveys, one-to-one interviews and focus groups across Scotland – aimed at ensuring the research was able to gather the views from a range of businesses, enterprises and community organisations. This primary research was wide-ranging and open, both geographically and sectorally, and included consultation and research with those that already use Gaelic, as well as those that do not currently use Gaelic – to assess both the current position and the potential use of Gaelic in this way.

However, this does not mean that the research is comprehensive, nor that it forms a census of all of those using Gaelic as an asset. We believe the research has achieved **good coverage**, and has been **able to identify examples of businesses and organisations where Gaelic adds value and is used as an asset**, but there is no doubt that there are many more examples not included/covered in this research where Gaelic is being used as an asset to add value to a transaction – social and/or economic.

The underpinning approach of focusing the primary research on the businesses, enterprises and community organisations was selected as it was felt to be the **approach most appropriate to fulfil the remit of the research**, which was **not just about the evaluating and evidencing the use and value of Gaelic** as an asset to the economy and society, but also **included the production of a range of tools and resources**. The tools and resources are regarded as a critical component of this work and the study has clearly been viewed as an enabling piece of research for the partners involved. The approach of focusing the primary research upon the businesses, enterprises and organisations using, or with the potential to use, Gaelic enabled the information and evidence required to support the development of the tools and resources to be captured.

It is important for us as the team that carried out the research, to reflect on, and set this particular research in its wider context for Gaelic. Whilst the wider context is included in the report (see Section 2), a key issue for this study relates to its unique remit – assessing and seeking to quantify the economic and social value of Gaelic as an asset.

The idea of **treating Gaelic as a narrow, economic asset is not appreciated or welcomed by some consultees, with there being genuine concerns that focusing on this treatment of Gaelic is contentious and has the potential to demean, or exploit, Gaelic**, rather than support and help to enhance the development of the language. This has not been the intention of the research, and it is important to emphasise that whilst this research has focused on highlighting examples and evidence of the economic and social value of Gaelic as an asset, **the report also gives due consideration to the wider role and contribution of Gaelic to the economy, and the role and contribution of the economy to Gaelic development**. Looking at Gaelic through this economic ‘perspective’ is not intended to ignore the wider language development aspects of Gaelic, or the wider linguistic, cultural, heritage and community role of Gaelic. It is intended to complement this wider role (Section 5 of the report looks at these inter-relationships).

One final reflection relates to assessing the role of Gaelic, and in particular, seeking to quantify the economic value of Gaelic as an asset. Not surprisingly, given the aforementioned reservations about assessing Gaelic in this way, alongside the fact that Gaelic is regarded by many of the consultees as an important or fundamental (but intangible) asset – ‘intrinsic’; ‘part of the fabric’; ‘Gaelic is integral’; ‘thread through the culture’ – **attempting to disentangle and quantify the value of Gaelic is extremely challenging** (even impossible) for many. This research is a first step, and has hopefully helped some businesses to start to consider the role of Gaelic in this way. However, the challenges that the study has faced in attempting to quantify the value of Gaelic as an asset (Section 6) suggests that there is some way to go with this, as many businesses do not currently think about Gaelic in this way. Hopefully this report will allow the merits of assessing Gaelic in this way to be understood, and **reassure those involved that it is a way of adding value to, and not detracting from, Gaelic development**. Within this, a more considered analysis by those businesses who use Gaelic about the various benefits and added value it provides to them, will, in time, hopefully help to address some of the challenges in seeking to assess and quantify Gaelic in this way.

The benefit of this type of research for Gaelic development is effectively captured in the quote below, drawn from an organisation that replied to one of the surveys:

*“In my childhood Gaelic was seen as a disadvantage. Giving it a monetary value by way of jobs is the single biggest factor in changing that attitude. Gaelic speakers begin to realise that they have an asset, and that brings confidence. Making it visible lets non-Gaelic speakers pick up words, and the fact that they want to makes Gaelic speakers more aware of the worth of their language”.*

## ANNEX 4: RELEVANT HISTORICAL CONTEXT

### Some aspects of the historical role of Gaelic in Scotland

The present context of Gaelic including its aspects of strength and weaknesses within modern day Scotland can only be understood within a context examining its historical journey as a language and culture, some parts of which are noted here.

Gaelic has been present in Scotland since the early centuries of the common era (CE) having been spoken widely in Argyll by 700 AD and most likely reaching its peak of influence towards the 11th century, where it became the common speech in most parts of Scotland. The language subsequently began its decline under Malcolm 3rd following his marriage to the Saxon Queen Margaret in 1070, after which Norman French became the language of court, and the seat of Scottish power moved to the South East Lothians, with Edinburgh eventually becoming its capital.

The situation in the Highlands and the West was slower in shifting from Gaelic to Scots or English, with the Lordship of the Isles protecting the language until its power diminished after the forfeiture of its estates to James IV (the last Gaelic speaking monarch) in 1493. It is a year later that published documents show Gaelic (formerly known as 'Scots') being for the first time referred to as 'Irish' with the previous lowland tongue of 'Inglis' now being recategorised as 'Scots'. Thus Gaelic was now increasingly depicted as 'foreign' or alien or indeed barbaric.

Ironically this was at a period when lexical divisions between Irish and Scottish Gaelic were becoming more noticeable, with Modern Irish (an Nua-Ghaeilge) becoming more prevalent in Ireland from about 1600 and a similar change appearing in Scottish Gaelic with its move away from the previously shared 'Classical Gaelic' about the same time.

Concurrent with this period, the position of Gaelic in Scottish society further diminished, coming under attack from successive royal dynasties in particular James VI who in 1598 categorised those speaking Gaelic and living in the Islands as "utterly barbarians without any show of civility".

A series of discriminatory acts were passed against the Gaelic community as early as 1609 with the Statutes of Iona, and in 1616 where their ratification by the Privy Council stated themselves to be in favour of abolishing the language 'it being one of the chief and principal causes of the continuation of barbarity and incivility amongst the inhabitants of the Highlands and Islands'. As well as these political attacks, (one effect of which was to restrict the easy passage of community Brehon/Brithem (judges/ tradition bearers/ bards) between Ireland and Scotland), Gaelic increasingly began to suffer from the spread of commerce, particularly up the East coast of Scotland which tended to be carried out through the medium of Scots or English.

A series of other circumstances also tended to put Gaelic speakers on the receiving end of societal change at this time. Post reformation (1560), many of the Islands and thus Gaelic speakers were associated with Catholicism and through this became the target of the protestant ascendancy – something which also linked them to the failed attempt to re-instate the Stewarts on the throne during Bliadhna a' Phrionnsa, (the year of the Prince) and the lead up to Culloden in 1746.

The aftermath of Culloden saw a series of changes in Scottish society which also led to depopulation in the traditional *Gàidhealtachd*. As well as many aspects of Highland life being prohibited during this period, most Clan chiefs left behind their original role of protecting their clan, and began to exercise a role more akin to that of a landlord, often clearing the land of people and replacing them with sheep – in particular the cheviot sheep after 1792 '*Bliadhna nan Caorach*' (the year of the sheep).

Mass emigration, some of it forced, some in search of a better life also took its toll with 20,000 leaving for America as early as 1803 (Hunter, 1976). MacKinnon has estimated that this was a period where 300,000 of the 335,000 population of the Highlands were monoglot Gaelic speakers. By the early years of the 19th Century it was estimated that there were now 50,000 Gaelic speakers in the US alone and approximately 75,000 Gaelic speakers in Canada towards the end of the century.

The passing of the Education Act Scotland 1872, also led to a situation (under the guise of 'modernism') whereby Gaelic was no longer used in any of the 90 or so schools in the Highlands, thus making Gaelic at best an invisible language and more normally a highly discriminated against mode of communication, with punishment meted out both within and outwith the class if pupils dared to use it<sup>36</sup>.

Further to the educational sphere the effect of WWI is also acknowledged to have been disastrous for Gaelic speaking communities which suffered a proportionately higher casualty rate than elsewhere in the UK, due to Highland military traditions and the high preponderance of merchant seaman from Gaelic speaking communities who were lost during the conflict (MacKinnon, 1991).

The passing of crofting legislation in the 1860s had brought an end to enforced clearances although significant emigration continued, as late as 1923 when the C.P.R. Liner *Metagama* departed from Lewis taking off 300 inhabitants – 280 of whom were young men, the average age 22 – to a new life in Canada.

Despite the changes in the nature of the Gaelic community which left it weaker in its traditional heartlands, the creative traditions within the community continued and were to see a renaissance towards the 2nd half of the 20th Century.

### **Some historic aspects of Gaelic used in culture, the arts, the media**

The first report of written Gaelic is thought to have been annotations by monks to the Latin work *The Book of Deer* in Aberdeenshire in 1138 and little else appears till some collected verse in the *Book of the Dean of Lismore* in 1512, written in Scots orthography. It is only with the publication of John Knox's *Book of Common Prayer (Foirm na n-Urrnuidheadh)* in 1597 that the first complete Gaelic work appears. This is followed towards 1688 by the *Fernaig Manuscript* in Wester Ross, but it is only in the later 18th Century that the wealth of still existing poetry of the Middle ages and later which had been preserved through oral tradition, is written down. This includes works by Màiri nighean Alasdair Ruaidh (c1615-c1705) and Iain Lom (c1624-1695). In 1767 the New Testament is published in Gaelic followed by the Old Testament in 1801.

<sup>36</sup> Although the attitude towards Gaelic in education has greatly changed today, as recently as 1994 The Scottish Office Education Department were still claiming that the expansion of Gaelic-medium provision at secondary level was "neither desirable nor feasible in the foreseeable future". (SOED 1994)



Throughout the 19th Century there was an explosion of Gaelic publishing perhaps reflecting the 29 thousand or so Gaels now living in urban settlements in Scotland. Nine hundred and five titles are printed between 1830 and 1900 – often read out at a ‘Taigh Cèilidh’, the urbanised version of the cèilidhs of the Gàidhealtachd.

Thirty five publishers in Glasgow alone were now publishing materials in Gaelic – mostly periodicals of which there were seven main Scottish ones (and one in Cape Breton).

The first Gaelic novel *Dùn-Aluinn* by John MacCormick appeared in 1912, followed a year later by *An t-Ogha Mòr* by Angus Robertson. It was to be 10 years later however that a third appeared also by Angus Robertson – the paucity of novels reflecting in some ways the low level of literacy, which could be directly related to the lack of educational provision in the language.

Although several publishers remained in the field of Gaelic in the latter half of the 20th Century, in particular Gairm, (publisher of the similarly titled publication 1951 – 2004), and Acair founded in 1977, it was only in the early years of the current Century that the *Ùr Sgeul* (‘New tales’) series of novels and short stories (approximately 30 in total) published under the Clàr imprint marked a real renaissance in Gaelic fiction, recently underlined by the appearance of the Aiteal (‘the Ray’) imprint, which like *Ùr Sgeul*, is backed by a rejuvenated Gaelic Books Council (founded 1968).

Gaelic Drama was first seen in public in 1902 with the first play, performed in Edinburgh and has remained a strong part of the Gaelic literary scene, with perhaps 350 plays currently existence, and active drama groups in Inverness, Glasgow, Edinburgh and the Islands. Likewise Gaelic choirs have continued to be a prevalent part of the Gaelic world with approximately currently active, focused normally at the Royal National Mòd which was itself created in 1891.

As a counterpoint to the Mòd, which was a competitive festival, the Fèisean movement started on Barra in 1981, and there are currently 44 Fèisean operating, 7 of which are Gaelic Medium. These normally take place for a week per year, but increasingly with longer impacts within their community, and currently with involvements in the Blàs festivals and other community oriented events. Other Gaelic Medium events have increasingly gained prominence in the creative sector, such as the Ceòlas festival which takes place every year around Daliburgh in South Uist. At a Scottish level, Proiseact nan Ealan, the Gaelic Arts Agency have continued to push the boundaries for Gaelic arts, despite recent funding setbacks, as have organisations such as An Lòchran and Ceol ‘s Craic in the Glasgow area. Creative (and other) issues are covered in Gaelic in the printed press from time to time in the eight or so newspapers which feature Gaelic from time to time, or like the West Highlands Free Press, have it as a regular part of their publication.

In terms of broadcast media, the first radio broadcast took place from the BBC in Aberdeen in 1923, with the first radio play *Dunach* (disaster) appearing ten years later. However it was not until after WWII that Gaelic was to appear regularly on the radio. Radio broadcasts were to develop in the 1970s with the launch of Radio Highland in 1976 in Inverness, and Radio nan Eilean in Stornoway in 1979. These later merged to form Radio nan Gàidheal in 1985

On television, apart from some rather ‘ropey’ outside broadcasts of the Mòd in the 1950s the first real Gaelic light entertainment broadcast was ‘Se Ur Beatha’ (You’re welcome) which was broadcast in 1964, with current affairs having to wait until 1970, when Bonn Comhraidh (‘Conversation topic’) was launched. Programmes for Gaelic schools and children started respectively five and seven years later, with the well known programme Dòtaman appearing in 1985.

In 1991 the Gaelic Broadcasting Fund was set up with £9.5m administered by the Gaelic Television Committee whose remit was later extended to radio. In 2003 the Gaelic Media Services were formed (MG ALBA) and in 2008 a new partnership was formed with the BBC to launch the BBC ALBA service in September 2008, made available on Freeview in June 2011. Programmes are now available for approximately 7 hours per day, with average viewing figures varying between 600,000 and 900,000 weekly in 2013.

## ANNEX 5: REFERENCES

- Baker, C. 2007, *A Parents' and Teachers' guide to Bilingualism*, 3rd edn, Multilingual Matters, Clevedon.
- Bradley, F. 2009, "Regional Innovation Environments in the Knowledge Society: Identifying a place for Irish" in *Language and Economic Development: Northern Ireland, the Republic of Ireland, and Scotland*, eds. J.M. Kirk & D.P. O Baoill, 1st edn, Queens University Belfast, Belfast, pp. 82-91.
- Branchadell, A. & Melià, J. 2011, "Language Policy in the World of Business and Consumer Affairs: from Non-Existence to Ineffectiveness" in *Democratic Policies for Language Revitalisation: the Case of Catalan*, eds. M. Strubell & E. Boix-Fuster, 1st edn, Palgrave, Basingstoke, pp. 201-223.
- Caimbeul, T. 2000, "The Politics of Gaelic Development in Scotland" in *Aithne na nGael/ Gaelic Identities*, eds. G. McCoy & S. Maolcholaim, Institute of Irish Studies, Queens University, Belfast/ULTACH Trust, Belfast.
- Campbell, I., MacLeod, M., Danson, M. & Chalmers, D. 2008, *Measuring the Gaelic Labour Market: Current and Future Potential. Parts 1 & 2*, Hecla Consulting, for Highlands and Islands Enterprise; Bòrd na Gàidhlig, Inverness.
- Centre for Interpretation Studies 2013, *Presentation of Gaelic in Visitor Interpretation Research Report*. Inverness. UHI
- Chalmers, D. 2010, "The Need to Integrate Policy and Good Practice – A Decade of Empirical Evidence" in *Coimhearsnachd na Gàidhlig an-diugh/ Gaelic Communities Today*, eds. G. Munro & I. Mac an Tàilleir, 1st edn, Dunedin Academic Press, Edinburgh, pp. 61-72.
- Chalmers, D. 2009, "The Promotion of Arts and Culture as a Tool of Economic Regeneration: An opportunity or a Threat to Minority language Development? – The Case of Gaelic in Scotland" in *Rights, Promotion and Integration Issues for Minority Languages in Europe*, eds. S. Pertot, T.M.S. Priestly & C.H. Williams, 1st edn, Palgrave MacMillan, Basingstoke, pp. 141-164.
- Chalmers, D. & Danson, M. 2009, *The Economic Impact of Gaelic Arts and Culture within Glasgow*, Glasgow City Council, Glasgow.
- Chalmers, D., Calvert, J. & Irwin, A. 2011, *Appraisal of Written Media Attitudes to Gaelic: Final Report*, Bòrd na Gàidhlig, Inverness.
- Chalmers, D. 2003, *The Economic Impact of Gaelic Arts and Culture*, Ph.D (unpublished) edn, Glasgow Caledonian University, Glasgow.
- Chalmers, D., Danson, M., Lang, A. & Milligan, L. 2013, "The Contribution of BBC Alba to Gaelic: A Social and Economic Review" in *Social Media and Minority Languages – Convergence and the Creative Industries*, eds. E.H. Gruffydd Jones & E. Uribe-Jongbloed, 1st edn, Multilingual Matters, Bristol, pp. 212-223.
- Chalmers D., and Sproull A. 2006, *The Demand for Gaelic Arts: Patterns and Impacts – a 10 year longitudinal study*, GASD Forum, Stornoway

- Cormack, M. 2013, "Concluding remarks: Towards and Understanding of Media Impact on Monority Language Use" in *Social Media and Minority Languages – Convergence and the Creative Industries*, eds. E.H. Gruffydd Jones & E. Uribe-Jongbloed, 1st edn, Multilingual Matters, Bristol, pp. 255-265.
- Cormack, M. 2010, "Gaelic in the New Digital Landscape" in *Coimhearsnachd na Gàidhlig an-diugh/ Gaelic Communities Today*, eds. G. Munro & I. Mac an Tàilleir, 1st edn, Dunedin Academic Press, Edinburgh, pp. 127-138.
- Fishman, J.A. 1990, "What is reversing language shift (RLS) and how can it succeed?", *Journal of Multilingual and multicultural development*, vol. vol 11, no. 1 &2, pp. p 5-35.
- Grin, F. 2009, "Promoting Language through the Economy: Competing Paradigms" in *Language and Economic Development: Northern Ireland, the Republic of Ireland, and Scotland*, eds. J.M. Kirk & D.P. O Baoill, 1st edn, Queens University Belfast, Belfast, pp.1-12.
- Hunter, J. 1976, *The Making of the Crofting Community*, 1st edn, John Donald, Edinburgh.
- Hutchison, R. 2005, *A Waxing Moon, the Modern Gaelic Revival*, 1st edn, Mainstream, Edinburgh.
- Ioan, G. 2011, "Waking the Dragon Within: Empowering Local Language Communities" in *A' Cleachdadh na Gàidhlig slatan-tomhais ann an dìon cànan sa choimhearsnachd (Benchmarks in defending language in the community)*, eds. R. Cox & T. Armstrong, 1st edn, Clò-Ostaig, Sleite, Scotland, pp. 109-122.
- James, C. 2011, "Gaelic and Welsh in the Community: Some reflections over 40 years" in *A' Cleachdadh na Gàidhlig slatan-tomhais ann an dìon cànan sa choimhearsnachd (Benchmarks in defending language in the community)*, eds. R. Cox & T. Armstrong, 1st edn, Clò-Ostaig, Sleite, Scotland, pp. 123-134.
- Johnston, R. 1994, *The Impact of Current Developments to support the Gaelic Language – Review of Research*, Scottish Centre for Information on Language Teaching and Research.
- Keane, M.J., Griffith, B. & Dunn, J. 1993, "Regional development and language maintenance", *Environment and Planning A*, vol. 25, pp. 399-408.
- Lang, A. 2011, "Cleachdadh na Gàidhlig san Ionad-obrach: MG Alba" in *A' Cleachdadh na Gàidhlig slatan-tomhais ann an dìon cànan sa choimhearsnachd (Benchmarks in defending language in the community)*, eds. R. Cox & T. Armstrong, 1st edn, Clò Ostaig, Sleite, Scotland, pp. 167-178.
- Lang, A. 2004, "Cruthachadh agus cleadh: ceistean air planadh cànan agus na h-ealain Ghàidhlig", *Rannsachadh na Gàidhlig*, ed. W. McLeod, Department of Celtic Studies, Edinburgh University.
- Leadbeater, C. & Oakley, K. 1999, *The independents: Britain's new cultural entrepreneurs*, Demos, London.
- Lingard, R.A., Pedersen, R.N. & Shaw, J.W. 1993, *Iomairt na Gàidhlig – A strategy for Gaelic Development in the Highlands and Islands of Scotland*, Highlands and Islands Enterprise.

- Mac an Tàilleir, I. 2011, “Luachadh Sgìlean Cànan anns an Àite-obrach” in *A’ Cleachdadh na Gàidhlig slatan-tomhais ann an dìon cànan sa choimhearsnachd* (Benchmarks in defending language in the community), eds. R. Cox & T. Armstrong, 1st edn, Clò-Ostaig, Sleite, Scotland, pp. 179-194.
- MacDonald, S. 1997, *Reimagining Culture: Histories, Identities and the Gaelic Renaissance*, Berg, Oxford.
- MacIleathain, R. & MacLean, R. 2010, *Gaelic on Signs and Maps in Scotland – why it matters*, 1st edn, Islands Book Trust, Stornoway.
- MacKay, D. 1982, *Cor na Gàidhlig - language, community and development: the Gaelic situation*, Highlands and Islands Development Board.
- MacKinnon, K. 1992, *An Aghaidh nan Creag: Despite Adversity – Gaeldom’s twentieth Century survival and potential*, CNAG.
- MacKinnon, K. 2010, “The Gaelic Language-Group: Demography, Language-Usage, Transmission and Shift” in *The Edinburgh Companion to the Gaelic Language*, eds. M. Watson & M. MacLeod, 1st edn, EUP, Edinburgh, pp. 128-145.
- MacKinnon, K. 1997, “Gaelic as an endangered language – problems and prospects”, *Endangered languages – steps in language rescue*.
- MacLeod, M. 2009, “Gaelic language Skills in the Workplace” in *Language and Economic Development: Northern Ireland, the Republic of Ireland, and Scotland*, eds. J.M. Kirk & D.P. O Baoill, 1st edn, Queens University Belfast, Belfast, pp. 134-152.
- McEwan-Fujita, E. 2010, “Sociolinguistic Ethnography of Gaelic Communities” in *The Edinburgh Companion to the Gaelic Language*, eds. M. Watson & M. MacLeod, 1st edn, EUP, Edinburgh, pp. 172-217.
- McLeod, W. 2013, *Gaelic in Contemporary Scotland: contradictions, challenges and strategies*, 1st edn, Available at: [https://www.academia.edu/1581180/Gaelic\\_in\\_Contemporary\\_Scotland\\_contradictions\\_challenges\\_and\\_strategies](https://www.academia.edu/1581180/Gaelic_in_Contemporary_Scotland_contradictions_challenges_and_strategies), Edinburgh University.
- McLeod, W. 2002, “Language Planning as Regional Development? The Growth of the Gaelic Economy”, *Scottish Affairs*, , no. 38, pp. 51-72.
- McLeod, W. 2001a, “Gaelic in the New Scotland: Politics, Rhetoric and Public Discourse”, *Journal on Ethnopolitics and Minority Issues in Europe*, , pp. 33.
- McLeod, W. 2001b, *The State of the Gaelic Economy: a research report*, Department of Celtic and Scottish Studies, University of Edinburgh, Edinburgh.
- Milligan, L., Chalmers, D. & O’Donnell, H. 2013, “What can Gaelic teach us about effective policy planning: Strategies in Gaelic language planning” in *Exploring the Dynamics of Multilingualism. The DYLAN project*, eds. A. Berthoud, F. Grin & G. Ludi, 1st edn, John Benjamins Publishing Company, Amsterdam, pp. 121-136.
- Milligan, L., Chalmers, D. & O’Donnell, H. 2010, “Gaelic Language Plans in Context: Issues of Application and Tokenism” in *Rannachadh na Gàidhlig 5 – 5th Scottish Gaelic Research Conference*, ed. K.E. Nilsen, 1st edn, Cape Breton University Press, Nova Scotia, pp. 332-338.

- O Baoill, C. 2010, "A History of Gaelic to 1800" in *The Edinburgh Companion to the Gaelic Language*, eds. M. Watson & M. MacLeod, 1st edn, EUP, Edinburgh, pp. 1-21.
- O'Hanlon, Fiona; Wilson McLeod; Lindsay Paterson, *Choice and Attainment in Gaelic Medium primary and early secondary education Soillse Research Digest 2*. Edinburgh University 2011.
- O'Hanlon, F. & Paterson, L. 2013, *Public Attitudes to Gaelic in Scotland*, 1st edn, Soillse, Edinburgh.
- O hAoláin, P. 2009, "Economic Development through language: The Gaeltacht Experience" in *Language and Economic Development: Northern Ireland, the Republic of Ireland, and Scotland*, eds. J.M. Kirk & D.P. O Baoill, 1st edn, Queens University Belfast, Belfast, pp.61-69.
- O Riagain, D. 2009, "The Irish Language and Economics: A Reconsideration" in *Language and Economic Development: Northern Ireland, the Republic of Ireland, and Scotland*, eds. J.M. Kirk & D.P. O Baoill, 1st edn, Queens University Belfast, Belfast, pp. 103-110.
- Ó Riagáin, D. 2011, "The Concept of Gaeltacht: Time to revisit?" in *Sustaining Minority Language Communities: Northern Ireland, the Republic of Ireland, and Scotland*, eds. J.M. Kirk & D.P. Ó Baoill, 1st edn, Queens University Belfast, Belfast, pp. 89-95.
- Oliver, J. 2010, "The Predicament? Planning for Culture, Communities and Identities" in *Coimhearsnachd na Gàidhlig an-diugh/ Gaelic Communities Today*, eds. G. Munro & I. Mac an Tàilleir, 1st edn, Dunedin Academic Press, Edinburgh, pp. 73-86.
- Paterson, L., O'Hanlon F., Ormston, R., & Reid, S. (2013) *Public Attitudes to Gaelic and the Debate about Scottish Autonomy in Regional and Federal Studies*. Taylor and Francis.
- Pedersen, R.N. 1993, *The dynamics of Gaelic development*, Highlands and Islands Enterprise.
- Prattis, J.I. 1983, "Industrialisation and Minority language loyalty: the example of Lewis", *Centre-Periphery Theory and practice - the 6th International Seminar on Marginal Regions*, pp. p 246 259.
- Price, A., Ó Torna C., & Jones A.W. 1997, "The Diversity Dividend: Language, Culture and Economy in an Integrated Europe" Brussels: European Bureau for Lesser Used Languages
- Reference Economic Consultants 2012, *Gaelic Employment Audit*, Reference Economic Consultants, for Bòrd na Gàidhlig, Inverness.
- Reference Economic Consultants 2011, *Evaluation of Bilingual Signs and Marketing Scheme*, Reference Economic Consultants for Comunn na Gàidhlig, Inverness.
- Rothach, Gillian (2006) *Gàidhlig aig an oir (Gaelic at the edge)* in *Revitalising Gaelic in Scotland* (Ed Wilson McLeod) Dunedin Academic Press Edinburgh
- Scottish Office Education Department, The. 1994, *Provision for Gaelic Education in Scotland: A Report by HM Inspectorate of Schools*, Her Majesty's Stationery Office, Edinburgh.
- Sorace, Antonella *Two are better than one in Children in Scotland Magazine* (January 2009, p.14-15)
- Sproull, A. & Ashcroft, B. 1993, *The Economics of Gaelic Language Development*, Glasgow Caledonian University.

- Sproull, A. & Chalmers, D. 1998, *The Demand for Gaelic Artistic and Cultural Products and Services: Patterns and Impacts*, Glasgow Caledonian University, Glasgow.
- Taylor, S. 2007, "Gaelic in Glasgow: The Onomastic Evidence" in *Glasgow, Baile Mòr nan Gàidheal City of the Gaels*, ed. S.M. Kidd, 1st edn, Department of Celtic, University of Glasgow, Glasgow, pp. 1-19.
- Van de Craen, P., Surmont, J., Ceuleers, E. & Allain, L. 2013, "How policies influence multilingual education and the impact of multilingual education on practices" in *Exploring the Dynamics of Multilingualism. The DYLAN project*, eds. A. Berthoud, F. Grin & G. Ludi, 1st edn, John Benjamins Publishing Company, Amsterdam, pp. 343-361.
- Walsh, J. 2009, "Ireland's Socio-economic Development and the Irish Language: Theoretical and Empirical Perspectives" in *Language and Economic Development: Northern Ireland, the Republic of Ireland, and Scotland*, eds. J.M. Kirk & D.P. O Baoill, 1st edn, Queens University Belfast, Belfast, pp. 70-81.
- Wells, G. 2011, *Perceptions of Gaelic Learning and Use in a Bilingual Island Community: an Exploratory Study*, 1st edn, Soillse research network, Sabhal Mòr Ostaig, Skye.
- Welsh Language and Economic Development Task and Finish Group 2014, "Report of the Welsh Language and Economic Development Task and Finish Group to the Minister for Economy, Science and Transport" (January 2014).
- West, C., Graham, A., (2011) *Attitudes towards the Gaelic Language*. Scottish Government Social Research. Edinburgh.
- Westbrook, S., Anderson, S., Brownlee, S. & Gregson-MacLeod, L. 2010, *The Economic and Social Impacts of the Fèisean*, Highlands and Islands Enterprise, Inverness.
- Williams, C.H. 2011, "The Imperial Reach and the Reluctant Response" in *A' Cleachdadh na Gàidhlig. Slatan-tomhais ann an dìon cànan sa choimhearsnachd*, eds. R. Cox & T. Armstrong, 1st edn, Clò Ostaig, Skye, pp. 295-312.
- Williams, C.H. 2009, "Governance without Conviction" in *Rights, Promotion and Integration Issues for Minority Languages in Europe*, eds. S. Pertot, T.M.S. Priestly & C.H. Williams, 1st edn, Palgrave MacMillan, Basingstoke, pp. 89-122.
- Williams, C. 1988, "Language Planning and Regional Development: Lessons from the Irish Gaeltacht" in *Language in Geographic Context*, ed. C. Williams, Avon: Multilingual matters, Clevedon, pp. 267-302.

## ANNEX 6: MATRIX SUMMARY OF BUSINESS CHARACTERISTICS OF THOSE QUANTIFYING VALUE OF GAELIC

Tables A6.1 and A6.2 below summarise the types of business that fall within the two groups used in the quantitative analysis included in Section 6 of the main report.

Group 1 is summarised in Table A6.1 and these are the business characteristics of the 38 businesses, enterprises and organisations that identified Gaelic as an asset and were able to provide quantitative measures of the economic value of Gaelic to their business.

Group 2 is summarised in Table A6.2 and these are the business characteristics of the 66 businesses, enterprises and organisations that identified Gaelic as an asset but were not able to provide any quantitative measures of the economic value of Gaelic to their business.

Table A6.1: Summary of characteristics of businesses identifying Gaelic as an asset and able to provide quantitative measures of the economic value of Gaelic to their business															
Sector	C	G	I	J		M	N	O		P		R		S	
Size	micro	micro	micro	medium	micro	small	micro	micro	micro	small	medium	micro	micro	small	micro
Location															
Argyll & Bute															
East Ayrshire															
Edinburgh															
Eilean Siar															
Glasgow City															
Highland															
Perth & Kinross															
Stirling															
West Dunbartonshire															

Table A6.1: Summary of characteristics of businesses identifying Gaelic as an asset and able to provide quantitative measures of the economic value of Gaelic to their business																		
Sector	A	C	E	F	G		H	I	J	M		O	P	Q	R	S	blank	
Size	micro	small	medium	micro	micro	micro	medium	micro	small	micro	small	micro	large	medium	micro	small	micro	micro
Location																		
Argyll & Bute																		
Edinburgh																		
Eilean Siar																		
Falkirk																		
Glasgow City																		
Highland																		
Moray																		
Perth & Kinross																		



**Published by  
Highlands and Islands Enterprise.**

[www.hie.co.uk](http://www.hie.co.uk)

To view other related published materials visit [www.hie.co.uk](http://www.hie.co.uk)

Highlands and Islands Enterprise,  
Fraser House, Friar's Lane,  
Inverness, IV1 1BA, Scotland

t. **+44 (0)1463 234171**

f. **+44 (0)1463 244469**

e. [info@hient.co.uk](mailto:info@hient.co.uk)



**INVESTORS  
IN PEOPLE**



**Highlands and Islands Enterprise**  
Iomairt na Gàidhealtachd 's nan Eilean