Scotland’s Creative Industries Partnership
Report on shared work plan
2017-2019
A report on Scotland’s Creative Industries Partnership

This report details work that has been delivered through joint working by all the members of Scotland’s Creative Industries Partnership (SCIP).

SCIP has provided a platform for ensuring that the needs of the creative industries are met effectively through the services provided by the SCIP partners, working together to ensure these services are complementary.

Context

Scotland’s Creative Industries Partnership (SCIP) was established in 2009 by the Scottish Government and concluded in 2019.

As a group, SCIP has been focused on achieving the economic growth of the creative industries, supporting employment, business development and sustainability. It has met quarterly to: share intelligence, research and knowledge on the creative industries; coordinate responses to needs and opportunities; clarify and improve individual agency support; align the work of delivery partners; and improve engagement with industry. It has also monitored the availability, appropriateness and quality of support to the sector, industry developments, and progress within the sector.

The membership of SCIP comprised national public agencies that are tasked – wholly or in part - with supporting the creative industries in Scotland. Through identifying opportunities and coordinating strategic interventions, each agency is able to provide appropriate and effective support either alone or in partnership. Each of these agencies also works with industry partners and local authorities through sectoral representative groups, industry lead bodies and direct relationships with individual businesses.

**SCIP Partners**

- Scottish Government
- Creative Scotland
- Scottish Enterprise
- Highlands and Islands Enterprise
- Scottish Funding Council
- Skills Development Scotland
- Scottish Development International
- Convention of Scottish Local Authorities (COSLA)/Business Gateway
- Scottish Local Authorities Economic Development Group (SLAED)
- The association for culture and leisure managers in Scotland (VOCAL)

In 2009 the Scottish Government set out a Framework Agreement that defines how the
different public sector agencies should work together to support the creative industries. https://www.gov.scot/publications/creative-industries-framework-agreement/

A shared plan was developed through 2016 and was agreed by the partners in early 2017, with a focus on reporting on key areas of shared working, building on the extensive consultation work undertaken in support of the Creative Scotland Creative Industries Strategy.
Introduction to the Shared Plan

A Shared Plan
This plan sought to define a set of aims that are common to all partners and which can help to develop the creative industries of Scotland in line with each of the partners’ corporate objectives and the national economic strategy. The plan was created by SCIP and was adopted as the guiding document for the work of SCIP.

SCIP was a coordination group and disbursed no funding.

Support and grant-funding for individual businesses is mainly delivered through Scottish Enterprise and Highlands and Islands Enterprise, with local authorities providing first level support through the Business Gateway network as well as directly through creative industries and/or cultural policies.

Investment in skills is led by Skills Development Scotland and export activities through Scottish Development International.

The Scottish Funding Council leads on the development of education and knowledge transfer across the Further and Higher Education sectors.

Highlands and Islands Enterprise also has a cultural and community development role.

Creative Scotland chaired SCIP as part of its Scottish Government-defined role of ‘leading the coordination of the Creative Industries’ and also works to support the growth of sustainable creative businesses, with a focus on building an effective infrastructure for creative business activity.

The work of SCIP is further augmented by a number of funded organisations that provide support and development services for creative micro-businesses and the independent creative area networks that have emerged in some of our cities and rural areas.

Key actions
The focus for SCIP was to define some actions to be incorporated into a Shared Plan that the partnership would progress. These were determined to be in areas that are in alignment with the partners’ own strategic objectives and which could genuinely benefit from joint working.

These areas were:
- Access to Support Services and Finance
- Digital
- Regional and Cross-region support
• Impact Evaluation
• Creating the conditions for success

This shared plan was intended to generate success in terms of the Scottish Government Economic Strategy. It established a link between Scotland’s culture and its economy, providing a plan that sets out how Scotland’s public sector, through working together, can support the successful development of Scotland’s creative industries.

Through its role as Chair of Scotland’s Creative Industries Partnership, Creative Scotland has led on the authoring of this report, which is a companion document to the Creative Scotland Creative Industries Strategy.

The consultation that led to the creation of the shared plan and this report has ensured that the different contributions of each SCIP partner are respected, understood and valued. Each has specific and distinct roles, but these were brought together in SCIP to support a single common purpose. All partners are committed to maximising the effectiveness of public investment in this important area, and aimed to use the shared plan to establish programmes of activity that extend beyond the quarterly meetings of SCIP within the context of the Scottish Government Economic Strategy.

This report is not a comprehensive review of all the work undertaken on an individual basis by each of the partners in support of the creative industries. Each of the partners continues to report on their own work through existing channels.
1. Access to support systems/finance

Lead: Highlands & Islands Enterprise

Shared Plan Actions

- To interrogate the statement that ‘access to finance is a problem’ in order to have a clear shared understanding of the needs of Scottish businesses in the context of the wider UK. What are the expectations amongst creative businesses in Scotland of what financial support should be available? – (e.g. grants/loans/equity investors?)

- To research the finance and investment systems of Scotland to identify and share information on what level of working capital is available for creative industries – from where, to whom, and on what terms.

- To identify, share and promote innovative solutions (Edge, crowdfunding etc.) and ensure that people are taking full advantage of them.

Report

1.1 Research and Evidence

1.1.1 Scotland ranks mid table on many of the OECD indicators, and the Scottish Government aspiration is to improve on this performance. Research has demonstrated that Innovation, Internationalisation and productivity are vital to improving this performance.

1.1.2 OECD evidence finds a link between economic openness and economic prosperity, with a 10% increase in trade exposure associated with a 4% increase in income per person in the long-run.

1.1.3 OECD evidence, supported by UK and Scotland-specific studies, finds that as businesses become increasingly international they become more competitive and productive. Furthermore, small and medium sized firms who export are more likely to innovate and grow faster.

1.1.4 The Enterprise and Skills Review undertaken by Scottish Government in 2016 -17 was clear in its desire to improve the level of support given to businesses in Scotland,
through a more joined up approach, and reducing the perceived clutter in the landscape. Fundamental to SG’s thinking was the Skilling Report\(^1\) which identified:

- Young firms (rather than small firms) are more likely to contribute to economic growth: young firms are more likely to grow in terms of sales and employment relative to small firms.
- Larger firms make substantial contributions to productivity, innovation, exporting, employment and so on – but frequently do not require as much policy support relative to younger, smaller firms.
- It is scale-up activity, rather than start-up activity per se that makes the contribution to economic outcomes (and is where policy attention should focus). The vast majority of firms do not grow beyond their initial establishment size (and indeed, few have any aspiration to do so).
- Internationally active firms are more productive, and grow more rapidly, than domestically oriented firms. This is both a self-selection issue (firms need to be more productive than average to absorb the costs of international expansion, and to compete in international markets) and also because of the dynamic effects in which internationally active firms experience more rapid productivity growth.

1.1.5 Highlands and Islands Enterprise commissioned Ipsos MORI to undertake research to understand how its customers conduct business and how they would like to do so in the future. Whilst account managed clients were happy with the service they receive generally, there were a number of areas highlighted that clients felt would help them:

- Proactive rather than reactive relationship with face to face interactions. Online resources are valuable but clients value talking to an account manager.
- Targeted and tailored information to each company based on their information, sector, stage of business and needs.
- Connecting with likeminded businesses that are at a similar stage in their journey.
- Online resources that could help them to identify potential business opportunities, for example by providing notifications from Public Contracts Scotland or other public bodies.
- Providing notifications of upcoming events, based on past events users had attended or those that they had specified an interest in, as well as supporting networking opportunities for businesses working on similar projects and initiatives.
- Detailing information once rather than repeating information through various applications.

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\(^1\) David Skilling report to the Enterprise and Skills Review 2016
1.2 Creative Industries

1.2.1 In March 2018, there were 15,505 registered enterprises operating in the Creative Industries growth sector in Scotland, sector characterised by small businesses. In 2017, 97.9% of Scottish Creative Industries registered enterprises were small (0-49 employees) accounting for 53.5% of employment in this sector, whilst large enterprises (250+ employees) accounted for just 0.6% of registered enterprises but 30% of employment. Almost all enterprises in the sector were UK owned with their registered office address in Scotland (97.6%); these accounted for 72% of employment in 2018. A further 1% of businesses were abroad owned, accounting for 19.4% of employment.

1.2.2 The Creative Industries in Scotland therefore are complex and diverse, ranging from voluntary, community-based arts activity to commercially successful businesses working in different sectors of the creative economy. The sector is characterised by fluid networks of individual practitioners, freelance workers and micro-businesses often operating across more than one creative discipline. Although there are obvious concentrations of activity in urban centres, the sector is buoyant throughout the country, with small clusters in places like Shetland, Skye and the Western Isles, often strongly linked into the local cultural scene e.g. Gaelic heritage within Innse Gall.

1.2.3 The 2018 EKOS evaluation of the XpoNorth support programme highlighted that an overall sectoral assessment suggested a significant but still somewhat fragmented sector, with large disparities in scale of the individual enterprises and an ongoing degree of reliance on freelancers and sole traders. Although this evaluation focused on the Highlands and Islands, this description is applicable to Scotland as a whole. The report however highlighted that:

- taken as a whole, the Creative Industries continue to have an important role in the economy and therefore present a strong case for support; and
- the specific structure of the sector suggests a need for a less traditional support model if resources are to be used effectively.

1.2.4 The XpoNorth approach was based on two assumptions:

- networks of very small businesses and sole traders can create greater scale and economic impact through collaboration, enabling higher levels of business activity and internationalisation; and
- the delivery of business support via the network model enables HIE to achieve greater reach into the sector than would otherwise be possible within the resources available to the organisation, not least as the majority of businesses in the sector would not meet the current criteria for account management support.
1.2.5 Two evaluations (EKOS 2013 and 2018) have now demonstrated that these assumptions hold good, and that the network model was delivering strong value for money in economic development terms. XpoNorth working alongside the networks has also been instrumental in helping to build the reputation of the creative industries in the area, and has grown to become a key event in the national and international calendar.

1.2.6 The Scottish Government’s own statistics show that the sector is one that offers significant opportunity because of high levels of innovation. Business Enterprise Research and Development (BERD) spending in the Creative Industries growth sector was £205 million in 2017, an increase of 22% from 2016. Spending on Research and Development in this sector represented 16.4% of the total BERD spend in Scotland.

1.2.7 Alongside the strategic case, the starting point for public sector intervention is to establish an efficiency rationale based around market failure – where the private sector cannot or will not deliver ‘optimum’ outcomes there may be a need for public sector intervention – e.g. if the private sector does not provide the relevant support itself, there is a case for the public sector to intervene. The first consideration is identifying the nature and scale of the market failure, and the second consideration is that the proposed intervention will address the market failure.

1.3 Imperfect Information

1.3.1 Information is needed for markets to operate efficiently. Where it is not fully available to both sides of the market (buyers and sellers), market failure can occur restricting the supply or demand for goods and services. To a large extent, with the growth of digital technologies and social media and the vast majority of businesses/individuals having access to the internet this has become less of an issue. While across the more remote rural areas there are still some gaps in digital connectivity, across the Highlands and Islands more generally access to information is no longer considered a major constraint for the sector. There is, however, still a challenge with regards to the quality of information that is available – ‘information overload’, with businesses having to differentiate between ‘good’ and ‘bad’ advice and information. As evidenced in the 2013 EKOS evaluation of HIE support to Creative industries, volume support services such as Business Gateway and similar services are not always entirely appropriate to work with and support the Creative Industries who often operate within niche markets, and have bespoke structures and business models. In particular, identifying and accessing new market opportunities is a constraint to growth and an area where more general business support provision does not provide the intelligence/information that will support creative businesses.
to penetrate these markets. Three in five (60%) of the businesses surveyed through the evaluation identified that accessing new markets was a challenge for them, along with accessing finance.

1.3.2 The Trade Networks address this market failure through linking businesses with sector specialists that have both knowledge and experience of working within sector, and have access to industry contacts and networks – supporting businesses to identify and access opportunities within new (and existing) markets.

1.3.3 In a period where we will see increasing pressure on public sector resources, it is essential that all businesses can put up the most effective case possible for finance, whether that be to the public-sector agencies or the private sector or through alternative sources of finance such as crowd funding. All require better gathering and analysis of data.

1.4 Scale and Institutional Barriers

1.4.1 As highlighted above, 98% of Creative Industries employ less than 49 people and 53% operate as sole traders – this is unlikely to capture all those that are freelance, nonetheless, the general message remains the same that the Creative Industries are characterised by small businesses. As a result, there are ‘scale’ issues faced by Creative Industries, for example in terms of deploying resources, access to finance/investment, and developing new opportunities. These challenges with scale will have a direct impact upon the sector’s opportunity to grow – both in absolute and proportionate terms. So, whilst the sector has the capacity to show economic growth, there is a requirement for access to resources, particularly as both innovation and internationalisation require investment and may take time to see revenue created from the investment. As evidenced by the two EKOS evaluations, specialised development support can achieve significant ROI, both through the success of new products and services, the sectoral growth achieved through collaborative working and the often relatively modest investment levels required.

1.4.2 The EKOS evaluation showed that 60% of respondents found access to finance was difficult, with 40% of those finding it very difficult.

1.4.3 There is also a widely held misconception that account management is the route to accessing finance from support agencies. Whilst it certainly allows access to greater options, it is only a single tool in the support infrastructure tool kit. What has been highlighted anecdotally however, is that removal of Creative Industries as a key sector by SE and SDI tends suggest that support is not available.
1.4.4 Account management does tend to offer greater access to finance, but in many instances, creative businesses are unable to move into account management because of the key measurements used – direct turnover of the business and direct employment in the business. This does not reflect the findings of the EKOS evaluation, which is that growing the sector and supporting the small businesses to collaborate, will in fact create additional employment and a significant increase in turnover, but it will be spread further than the individual business. It is reasonable to suggest that this limits access to finance, whether because of elements of support available only to account managed clients, or because of a lack of information on what might be available. Looking at the evidence of HIE’s Innovate Your Business programme, offering funding of up to £15k. The creative sector had the highest level of successful applications, with almost 20% of the total applications (followed by food and drink at 14%). What is also notable however, is that only 20% of these came from account managed businesses or through the innovation team directly. The largest majority of businesses then, accessed the scheme through the specialised industry networks. This scheme is too new to assess the overall returns.

1.4.5 Just over half (53%) of respondents had accessed business development support from another provider, in addition to the Trade Network. By far the most common support provision was through Business Gateway, with over one third of businesses (36%) reporting that they have engaged with the service. 6% of respondents listed ‘Other’, with 5 organisations including Creative Scotland listed.

1.5 HIE approach

• XpoNorth network – support and encourage collaboration, internationalisation and innovation. Provide specialist sectoral knowledge, networking and signpost other support/development opportunities. Support engagement with other parts of HIE.

• XpoNorth Digital – training and support with a focus on data and digital tools to maximise the returns from audiences / client base / consumers – including crowd economy etc.

• Increasing access to account management, including short interventions and relationship management.

1.5.1 The HIE strategy maintains a focus on key sectors as the drivers of future growth, including the Creative Industries. This provides the high level strategic context for HIE’s intervention via the XpoNorth Network. More specifically, the work has the potential to contribute to the priorities of the Scottish Government Economic Strategy priorities through:
• the focus on connecting companies and practitioners to markets, with a view to increasing investment into the sector;

• a strong emphasis on innovation as the driver of future competitiveness across the sector, raising overall levels of innovation in the region;

• building international market connections through trade fairs, overseas missions and international collaborations and relationships; and

• recognition of the importance to local communities of the Creative Industries, particularly in some of the more remote parts of the Highlands and Islands, contributing to the priorities around inclusive growth and community empowerment.

1.5.2 The 2018 EKOS evaluation of creative industries support in the Highlands and Islands showed that 60% of respondents found access to finance was difficult, with 40% of those finding it very difficult. From evaluation work and research, it appears that there are three key reasons for the difficulty felt by businesses in a sector predominantly comprising small businesses.

• Imperfect information and data
• Scale and institutional barriers
• Public sector finances and the economy.

1.6 Recommendations

• Less traditional targeted intensive support which builds on/works with the account management model. Potential for shorter, sharper engagements which focus on an agreed set of milestones and interventions which are evaluated on exit.

• The approach needs to be agile and proactive.

• Flexibility over the evidence of growth – additional metrics.

• Clear, transparent criteria for segmentation to be published.

• Networking opportunities required.

• The current landscape of business support can be confusing to customers – clarity required.

• Support with data and alternative finance options.
2. Digital

Leads: Scottish Enterprise and Creative Scotland) with Scottish Funding Council

Shared Plan Actions

2.1 Emerging technologies

Stimulate creative businesses to engage and experiment with emerging technologies (e.g. Augmented Reality, Automated processes, Cultural Analytics)

2.1.1 Scottish Enterprise with Festivals Edinburgh commissioned BOP Consulting to provide case studies of international best practice applications of digital technology in festivals to support the Festivals Digital Task Group (of which Creative Scotland is also a part). The report builds upon the four key areas of opportunity identified in the Thundering Hooves 2.0 strategy: Infrastructure, Content, Distribution, Promotion.

2.1.2 City Region Deal: The Edinburgh and South-East City Region Deal was signed in August 2018, securing £1.1bn from the UK and Scottish Governments to drive investment, including through a transformational programme of data-driven innovation to harness the power of data technologies. One of the six sectors identified for development was that of ‘Festivals & Tourism’, and the University subsequently recruited a Sector Team Lead to support that programme – thus providing the human resource originally identified in the Digital Proposal.

2.1.3 PLACE Programme: Following this, the Scottish Government and City of Edinburgh Council agreed to each provide £5 million over 5 years to fund a new programme to grow the festivals’ contribution to Scotland’s culture and economy, with the Festivals pledging to raise a further £5 million. The Platforms for Creative Excellence (PLaCE) programme will support programme innovation to secure global competitiveness - thus fulfilling aspects of both the ‘content and ‘distribution’ strands of the Digital Proposal, the results of which will become evident as the PLaCE programme moves in to its initial delivery phase over the next three years.

2.1.4 Creative Scotland extended its Curiosity Programme and two new Augmented Reality projects have been showcased during the Edinburgh Festivals. These are the output of research collaborations between artists and technologists and partnerships with BBC Connected Studios.
2.1.5 Chancellor’s Fellow: Drew Hemment – the digital pioneer who created the world renowned digital festival FutureEverything - was appointed to the new post of Chancellor’s Fellow at the University of Edinburgh, where he will help develop the Edinburgh Futures Institute. It aims to harness the digital revolution for social benefit and will be housed in the former Royal Infirmary at Quartermile when redevelopment work completes in 2021.

2.2 Digital public space
Encourage the development of digital public spaces through Scottish Futures Trust.

2.2.1 Creative Scotland instigated a public Wi-Fi augmentation project with five less connected cultural and creative industries hub organisations (Timespan in Helmsdale; Taigh Chearsabhagh on South Uist; An Lanntair in Stornoway; The Stove in Dumfries; and Shetland Arts). This was designed to generate awareness and case studies with a view to developing a larger scale project when funds permit. Creative Scotland also focused on the importance of gathering and analysing sectoral data during a one day conference as part of its support for FuturePlay, the new name for the Edinburgh Digital Entertainment Festival.

2.2.2 Scottish Futures Trust have led the development and establishment of the Scotland Innovation Partnership (SIP) across industry, universities and the public sector as well as a 5G Hub.

2.3 Data
Work with The Data Lab Innovation Centre to identify appropriate activities to help businesses in the Creative Industries exploit the opportunities arising from the use of data

2.3.1 Close engagement with The Data Lab has been established with a range of sector facing activities delivered. First event took place on 21st August 2017 as Part of FuturePlay at the Edinburgh Fringe. The importance of the understanding and use of data for the sustainability of creative industries has been identified as a major opportunity.

2.3.2 Data Lab in partnership with Festivals Edinburgh and Edinburgh Tourism Action Group ran the Edinburgh Tourism Innovation Challenge to promote data-driven innovation in the tourism sector including how Edinburgh Festivals can best use data to create opportunities and experiences for businesses and audiences.

2.4 Partnerships
Work with Scottish Digital Catapult and existing SFC Innovation Centres to ensure effective engagement with the Creative Industries.

2.4.1 Creative Informatics: A partnership application to the Arts & Humanities Research Council [AHRC] was successful and Edinburgh became one of nine creative clusters across the UK in an £80 million programme - funded by the Industrial Strategy Challenge Fund. The project is aiming to increase the use of digital technologies to improve audience experience in the screen and performance industries. The Festivals were not only identified as partners in the application, but specifically referenced by industry bodies as one of the unique selling propositions. A Steering Group has been put in place for the Creative Informatics project, with a number of members drawn from our original Digital Task Group – University of Edinburgh, Creative Scotland and Festivals Edinburgh - as well as the Scottish Funding Council and a representative from the research agency [BOP] commissioned by Scottish Enterprise to initiate this programme of work, thus providing a high degree of continuity between past and future work.

2.4.2 Dundee InGAME Cluster: A new multi-million-pound Innovation for Games and Media Enterprise (InGAME) project will establish a dedicated research and development centre for the Dundee video games cluster with a view to driving product, service and experience innovation across the industry. Led by the city’s Abertay University, in partnership with the University of Dundee and the University of St Andrews, the project will offer a high level resource to local, Scottish and UK games companies, benefiting from significant funding from the Arts and Humanities Research Council’s (AHRC) Creative Industries Clusters programme and the Scottish Funding Council. Games industry partners include 4J Studios, All4Games, BBC, Beano Studios, Biome Collective, DeltaDNA, Microsoft, Outplay Entertainment and Sony Interactive Entertainment Europe, while business and cluster development will be supported by Creative Dundee, Creative Scotland, Elevator UK, Interface, Dundee City Council, Scottish Enterprise, TIGA, UK Games Fund and UK Interactive Entertainment and V&A Dundee.

2.4.3 We recognise the significant effect of digital technology, not only as a driver for economic growth, but also as a way for creative enterprises to create new products, services and experiences and reach new markets and audiences locally and internationally. We are therefore continuing to work together to ensure that the creative industries make best use of Scotland’s talent in the application of digital technology to ensure the success of all future business activity. The key relationships with Innovate UK (sponsor of Digital Catapults)
and the Innovation Centres are with Scottish Enterprise and The Scottish Funding Council respectively.

2.5 Recommendations

There have been several significant activities in the area of digital in the creative industries, particularly involving stakeholders outside of SCIP most notably in the area of City Region Deals and UK Research Council funding. This has led to a broadening of the landscape in which we work. We therefore recommend that the future work of SCIP partners looks to exploit these broader collaborative opportunities to the fullest extent as follows:

- **City Region Deals**: coordinate SCIP partners’ involvement with individual city region deals in Glasgow; Edinburgh; Stirling; Tay Cities; Islands; and Aberdeen and identify, as appropriate, opportunities that bridge the individual deals.

- **Research Council Funding**: maximise the benefit accruing to Scotland from the existing secured funding packages such as the AHRC funded projects in Edinburgh and Dundee as well as coordinating public sector response to new calls.

- **Innovate UK including Catapults**: ensure activities of UK wide initiatives such as the Digital Catapult engage closely and effectively with organisations and companies in Scotland.

- **Local Initiatives**: coordinate activities with location specific initiatives across Scotland such as the Glasgow Innovation District and with groups actively pursuing digital opportunities in the Creative space such as Rural Scotland and Scotland’s Town Partnerships.
3. **Regions/Cross regional support**

Leads: VOCAL, Scottish Enterprise, SLAED

Shared Plan Actions

- **Key contacts**
  To have determined a named key contact for SCIP in every Business Gateway delivery area and to be working towards place agreements as appropriate to the region. Link to LA cultural activities, plus Chambers of Commerce/Federation of Small Businesses.

- **Regional strategies**
  To have identified and be backing regional strategies and local mechanisms that are in place for the Creative Industries across Scotland.

- **Visitor economy**
  Explore the opportunities to build on the existing tourism collaborations (e.g. Edinburgh Tourism Action Group) with a view to identifying and supporting opportunities to increase economic value by enhancing the overall experience (creative industries, tourism and food and drink) for the visitor.

Report

3.1. Given a number of challenges in comprehensively collating key named contacts in local authorities, an alternative approach was proposed that will involve more focused working with local authorities who have demonstrated an explicit existing commitment to creative industries.

3.2. This work was further developed in early 2019 when a workshop was delivered. This one day event, entitled **Supporting Local Creative Businesses**, was aimed at supporting those working in Local Authorities and/or local development organisations to better understand the opportunities and challenges in growing local creative business activity by:

- offering perceptions of the sector;
- exploring good practice, opportunities and gaps
- aiming for a shared understanding of what is required to develop a more effective approach across Scotland.

3.3. The event’s target audience was those in Local Authorities and independent organisations that are active in providing support for creative businesses at local level; both cultural development and economic development staff. The event’s specific objectives were:
- To share information and experiences of how creative businesses are supported locally
- Help develop a better understanding of the current map of support, engagement, and funding for them
- Share best practice
- Identify gaps in support or funding
- Explore ways to address current challenges
- Contribute to the development of SCIP’s shared plan for the sector
- Get feedback from discussions with key sectors in the creative industries

3.5 The programme allowed a broad range of experience and perspectives – it featured a large number of contributors, which the world café format made easier to facilitate.

3.6 The target attendance audience was well represented on the day. In general, respondents felt the day went well and was useful:
- Absolutely loved this event and was fascinated and inspired by the other projects.
- I thought it was an incredibly positive and useful day.

3.7 The contributions on the day, in plenary and World Café conversations, presented a range of challenges for the public sector bodies. SCIP were hoping the day would produce contributions (that highlighted areas where the CI sector (and the public sector bodies) find areas that require to be addressed. In contributions from the floor these also included:
- the nature of public sector intervention - what should it be – and where is it best located within the business development/support process
- the relative complexity of current public sector provision of support and the confusion/overlap – actual and assumed – this might lead to from the CI producer’s perspective.
- the potential for institutional responses and structures (and timescales) to be less appropriate to what creative businesses require by aligning closely to their internal targets, rather than retaining a flexibility of response to reflect what the sector actually requires (which might be a simpler and more direct response in some cases).
- turning macro-intervention intent at strategic level (the public sector) into relevant micro-intervention actions at business level (CI sector)

3.8 Networking and exchange
A primary objective of the day was to assess the need for a network that brings together participants from this sector. Informal conversations on the day, and
since, suggest that there is an appetite for this as it is an area where, as public sector resources/staffing decline, officers can feel they are becoming increasingly isolated. A key part of the networking value was expected to be the opportunities for exchange of information, experience, and intelligence.

The event can be considered a success – it was clear in what and who it wanted to engage, and it did so in a manner that encouraged contribution, allowed many different voices to be heard, developed an embryonic sense of community and willingness to network.

3.9 **Creative Tourism.**
In response to the action to facilitate meetings between the creative industries and tourism sectors to work together in support of the regional strategies, Creative Scotland supported Highlands and Islands Enterprise to deliver a one day symposium during XpoNORTH in June 2018 entitled ‘What did Creative Tourism ever do for us?’.

3.10 The overall aim of the event was for creative and cultural organisations to demonstrate the interconnectedness of Creative and Cultural Industries and the tourism sector, highlighting examples of good practice and success, sharing information on trends, opportunities and challenges and to start a longer-term process of dialogue which will lead to increased collaboration and business opportunities and increase economic benefits of both tourism and creative and cultural activity.

3.11 The XpoNORTH sessions covered: a selection of examples from around Europe, from co-creating stories between locals and visitors to support cultural heritage to re-inventing the Costa del Sol through Creative Tourism with Antonio Carlos, founder of Spanish Creative consultancy Economia Creativa; the experiences of Dougal Perman from Inner Ear, streaming events such the Cowal Gathering, offering an opportunity to find out how streaming works and the potential to engage with a global audience and generate new income; presentations from Joe Gibbs, founder of Belladrum Tartan Heart Festival and Jessica Fox, whose career spans NASA to the Wigtown Book Festival, discussing what makes a great event, why place matters and why events are important for visitors and locals alike. Dave Vincent (Chief Digital Officer, Invest Northern Ireland and Tourism Northern Ireland) and Darroch McNaught (Deuxality) presenting some of the latest digital technology projects that are supporting tourism businesses across Scotland and in Northern Ireland; and Prof Ken Neil talking to some of Europe’s biggest gallery ‘brands’, to understand how they how they present
themselves and their location, how they keep their profile fresh and engaging to locals and visitors, and just what difference they can make to a community.

3.12 In addition to the event at Xpo North, Data Lab, Scottish Enterprise and the Edinburgh Tourism Action Group (ETAG) joined together to run the Edinburgh Tourism Innovation Challenge - a 3 day event which brought together teams of technology professionals and students with tourism and festival related experts to analyse a range of tourism data sets (from taxi companies, cultural attractions, hotels, etc.) and help take steps to solve challenges facing Edinburgh’s tourism industry. There were over 120 participants and the weekend resulted in five projects which had the chance to apply for Innovation Funding of up to £3k per project to further develop their ideas. Funding has now been awarded to three projects. Other participants from the hack are receiving support through SE’s innovation service, Interface and the Data Lab and SE are currently investigating the use of the Can Do Innovation Fund to support the additional outputs from the challenge.

3.13 In response to the Government’s themed year of History, Heritage and Architecture, SE, through ETAG, brought together partners across the tourism and heritage sectors to drive new collaborations at a destination level. Two flagship projects were developed - Edinburgh’s Georgian Shadows project which showcases the history and heritage of the New Town in a creative and innovative way through the use of digital technology and storytelling, and ‘The History of Edinburgh in 101 Objects’ which was an innovative collaboration bringing together partners to deliver an entirely new visitor experience and innovative marketing campaign. SE support enabled ETAG to bring together core partners including Edinburgh World Heritage and Marketing Edinburgh with over 40 different ‘object owners’ to develop an inclusive digitally-led collaboration which has engaged partners across sectors including tourism, heritage, festivals and food and drink.

3.14 The Edinburgh Festivals Digital Task Group was also established at the same time as the SCIP shared plan and brought together the creative, enterprise, festivals and digital sectors. Festivals Edinburgh led on the development of a Digital Strategy for the Festivals which focused on four key themes - content, distribution, infrastructure and promotion – and set out an ambition to use the festivals as a laboratory for experimentation which will result in a range of demonstrator projects to drive further innovation across the creative and digital sectors.
3.15 In early 2019 it was agreed that this work be absorbed into the successful ‘Creative Informatics’ project – led by Edinburgh University and supported by the Arts & Humanities Research Council and the Scottish Funding Council as part of the UK Industrial Strategy. Key partners of SCIP (CS, SFC, SE) all have a stake in this project alongside City of Edinburgh Council and have contributed to the original application for the 4.5yr/£8m project as well as to its programme and management.

3.16 As part of a wider push to increase the value of international visitor spend in Glasgow, Scottish Enterprise has been working with partners to develop a collective plan to make Glasgow more attractive to existing and emerging markets focused on Scandinavia, China and India. Similar to their China Ready work in Edinburgh, the approach is aimed at engaging businesses across the entire customer experience, bringing in food and drink, attractions and digital companies.

3.17 Businesses developed a number of new cultural tourism products and experiences through SE’s Dundee Cultural Business Fund in 2017. The fund aligned with the city’s tourism strategy and provided tourism products to compliment the V&A. To date, the fund has made 10 awards to collaboration projects across the city. A key outcome is collaboration between the creative, digital and tourism sectors – collectively focusing on enhancing the visitors experience around Dundee’s local cultural assets, many of which are Creative Scotland Regularly Funded Organisations. SE also supported 14 businesses to attend a Cultural Tourism Learning Journey to Liverpool last year. This provided these businesses with a unique opportunity to look at what makes a successful cultural tourism destination.

3.18 Scottish Enterprise is leading engagement with partners to develop and deliver a SMART Tourism programme for Scotland focusing on Travel Tech, Data Driven Innovation and building Digital capabilities. As this work develops, SE will continue to build a portfolio of TravelTech companies in order to bridge the gap between technology provision and the development of further digital related products and services. This programme will look at all aspects of the customer journey and will touch on a number of sectors as a result.

3.19 **Recommendations**

- Establish new regional partnerships with creative industries/creative economy sub groups to take forward more collaborative work.
• A framework/guidance to be identified for each of the regional partnership groups.
• Establish a forum for public sector networks to meet with those out there leading in the sector and for a dialogue to be facilitated regarding what both sides of the equation feel is of value to the other.
• SCIP partners to organise a follow-up event which targets both groups with the objective of supporting a dialogue and exploring what a new way forward might look like/require.
4 Impact evaluation
Leads: Scottish Government with Scottish Enterprise and Creative Scotland

Shared Plan Actions

- **Measuring the size of the Creative Industries**
  Based on Scottish Government statistical base, identify gaps in existing knowledge base and consider if and how to address them. This should include issues of comparability with data from the rest of the UK, highlighted by the Scottish Affairs Committee Inquiry into the Creative Industries, and being considered through the British Irish Council Creative Industries workstream.

- **Measuring public sector investment in the Creative Industries**
  Report various types of expenditure such as directly attributable agency spend such as grants/lottery funding, spend where multiple sectors are beneficiaries and the Scottish portion of UK wide funding e.g. tax credits.

- **Measuring impact of public sector investment in the Creative Industries**
  Agree approach for future measurement of benefits and economic impact of public money invested. Explore opportunities to measure broader impacts of the Creative Industries over and above economic return, within the context of the Scottish Government’s ambitions for inclusive economic growth.

- **Forecast growth opportunities for the sector**
  To reflect on development goals for the sector based on the information available.

Report

4.1 Measuring the size of the Creative Industries

Using Scottish Government’s Growth Sector Statistics, conclusions can be drawn about the sector’s contribution to Scotland’s economic growth and change in the size of sector over time. The Growth Sector Statistics are defined using Standard Industrial Classification (SIC) 2007 codes which are used to classify business establishments by the main type of economic activity in which they are engaged.

- The Creative Industries had a turnover of £8.6 billion in 2017. This is an increase of £900 million on the 2016 turnover figure of £7.7 billion.
- The GVA of the creative industries continues to grow and in 2017 was £4.9bn (the most recent data available). This is a significant increase since 2010 when GVA stood at £2.7bn.
• The GVA growth over the latest year has been driven by GVA growth in the software/electronic publishing sub-sector.
• In 2017, Scottish creative industries exports were £3.7bn – 4.6% of total international exports.
• In 2018 the Creative Industries includes 15,505 registered enterprises. These are predominately small enterprises; 57.5% are sole traders and 30.1% have less than five employees.
• In 2017, the Creative Industries employed 77,000 people. This is a 9.4% decrease on 2016 (84,000 employees).

4.2 Limitations with this data

While these statistics are helpful to track trends over time and compare with other sectors, it is clear they do not tell the whole story of the size of the creative industries in Scotland. There are a number of significant limitations which means they have to be treated with caution:
• They do not include the freelance workforce.
• They rely on businesses self-classifying their economic activity and little is known about the reliability of this method.
• The data is based on international classifications. As the balance and make-up of the economy changes, the international classifications are less able to provide the detail most suitable for creative industries
• The data breaks down to the level of the 16 subsectors but due to issues around commercial sensitivity, it is not possible to get a more in-depth understanding of what lies behind the figures.

4.3 Differences from the UK

The UK Government uses the same basic SIC codes but categorises these differently.
• They identify 9 instead of 16 subsectors in the creative industries
• They allow for double counting of SIC codes, i.e. the SIC code for Publishing of computer games appears in creative industries as well as in digital industries.
• They present different figures for
  - Creative Occupations - those identified as being jobs that are creative in nature
  - Creative Industries - any industries that are composed of a certain proportion of Creative Occupations, but are inclusive of the non-Creative Occupations in those industries
  - Creative Economy - includes both the Creative Industries and all the Creative Occupations outside the Creative Industries
Analysis by the British Irish Council Creative Industries workstream has also shown that definitions of the creative industries vary across the administrations: the UK, Wales, Northern Ireland, the Isle of Man, Jersey and Guernsey work to broadly the same definition while Ireland differentiates between creative and cultural industries, and although Scotland previously followed the UK definition, it changed its approach to ensure that its definition would fit the wider set of Scottish Government Growth Sector definitions.

4.4 Measuring public sector investment in the Creative Industries

• The work on this action was undertaken mainly by data analysts based in Creative Scotland, Scottish Government and Scottish Enterprise with the intention of assessing the level of investment by SCIP partners in the Creative Industries in 15/16 and 16/17 (identifying specific screen spend /staff costs where possible) and also to identify what data and intelligence is collected by SCIP partners.

• Overall, this work has illustrated a number of challenges around data collection, in particular the lack of comparability of data; differences in definitions; and differences in type of investment/support. A report presented to the Sept 2018 SCIP meeting noted a number of learning points:
  - The majority of partners have required significant resource to gather the annual investment information required
  - There were challenges around prioritisation of this work by partners given the resources required. Difficulties in extracting the required data. It has not been possible to account for every £1 spent and returns have had to include some assumptions and informed estimates;
  - The gathering of staff costs was problematic and in some cases too arbitrary to attempt to make a meaningful assessment e.g. in SE where a number of staff work across several industry sectors and thematic areas;
  - Overall, this was a lengthy and challenging exercise and has required resource and staff time from partners.

• It is also the case that the majority of the data collected is operational rather than strategic, relating mainly to activity and output reporting, for example, the early stages of a logic model (inputs – activities – outputs – outcomes – impacts).

• A net additional impact assessment would normally involve an assessment of return on public sector investment (i.e. every £1 of public sector spend results
in £X of Gross Value Added for the Scottish economy; normally expressed as a ratio e.g. 1:3) and involves assessing the following:

- **Deadweight** – the proportion of benefits/impacts that would have occurred had no public sector support been provided;
- **Displacement** – the negative impact that support has upon other companies not supported;
- **Leakage** – the proportion of the impact that benefits economies outside Scotland;
- **Substitution** – when a company deliberately stops doing an activity to take advantage of public sector support (normally relates to labour market subsidies and is generally not an issue in the majority of assessments);
- **Multiplier effects** – the knock-on effects in the economy (e.g. supply chain) associated with public sector support.

- An economic impact assessment (typically carried out as part of a wider evaluation study) ideally is built on data and intelligence already available (desk research) and is usually supplemented by surveys (primary research) of beneficiaries/stakeholders etc. which would seek to tease out the benefits and impacts of support in greater detail. It therefore relies on planning for the evaluation well in advance and data being available to support the evaluation rather than starting with “a clean sheet of paper” at the point of evaluation - which would be costly and inefficient.

### 4.5 Summary:
The objective of the group had been to agree an approach to assess the economic impact of the Creative Industries. Assessing the scale of partners’ investment in the Creative Industries was agreed to be a useful first step which would also be critical in a future assessment of economic impact.

- The majority of partners have required significant resource to gather the annual investment information required.
- Difficulties in extracting the required data: It has not been possible to account for every £1 spent and some elements have involved assumptions and informed estimates.
- The gathering of staff costs was problematic and in some cases too arbitrary to attempt to make a meaningful assessment e.g. in SE where a number of staff work across several industry sectors and thematic areas.
- Overall, this was a lengthy and challenging exercise and has required significant resource and staff time from partners.
4.6 Recommendations

Given the potential complexities, challenges and resources required, we would not recommend that an assessment of net additional economic impact is undertaken going forward.

Instead, future work by public sector partners could involve an increased focus on sector data, including its relation to the new national performance outcome for culture and the Enterprise and Skills review work on alignment of management information. Future work could also consider how non-economic benefits, in particular social and cultural value, could be more effectively captured and articulated.

Future work could also explore the possibility of working with the Creative Industries Policy and Evidence Centre (PEC), established as part of the Creative Industries Clusters Programme led by the Arts and Humanities Research Council (AHRC), to strengthen public sector partners’ intelligence on the Creative Industries sectors in Scotland.
5 Creating the conditions for success
Lead: VOCAL plus Skills Development Scotland

Shared Plan Actions

- Explore current position regarding public support systems for creative industries and cultural businesses.

- Establish development pathways for diverse creative and entrepreneurial talent across the sub-sectors.

- Develop a narrative around the creative industries to inspire new opportunities across the public and private sectors and review annually.

- Ensuring success and learning is celebrated within the terms of the triple bottom line.

- Successful engagement with the private sector – wider support for the creative industries.

Report

5.1 In order to review the perceptions of public support systems, an initial workshop was organised in late 2017 with key sector development agencies from the creative industries. The agenda was framed around a series of discussion points:

- What are the needs of creative businesses in their sub-sector to deliver sustainability and growth?
- Are they specific or general – i.e. what kind of solution would best meet their needs?
- How is intelligence in relation to the support needs of creative businesses currently collated?
- How does the public sector perform at the moment in supporting creative businesses, and what are the gaps?

The session was an opportunity to discuss the SCIP Shared Action Plan and for SCIP members to gain insight from the key creative industries association memberships on their views on the available public agency business support and how this could be improved. It was agreed that this session would not be formally minuted, but the key actions or issues would be noted.
5.2 Those attending were from the following: Senscot (Social Enterprise); Independent Games Developers Association (Video games); Scottish Contemporary Arts Network (Visual Arts); Scottish Book Trust (Literature); Office of the Design Economy (Design); Federation of Scottish Theatre (Performing Arts); Craft Scotland (Craft); Architecture + Design Scotland (Built Environment); Applied Arts Scotland (Craft); Publishing Scotland (Publishing)

5.3 The discussion was wide ranging and productive, the key points being:

- **Respect and Understand the Motivations of Creative Practitioners.** A key theme of the discussion was that public agency advisers need to respect and understand that the key motivations for practitioners are not always going to be economic, but can often be artistic, creative, community-based or social. They are often a blend of these and even perhaps others such as political, environmental or religious. These can often be the drivers for innovation and development of practice. The issue for SCIP and, in turn, the partner agencies to consider is how can these values be understood and supported through the delivery of public support.

- **Recognition of the Triple Bottom Line Value by SCIP is welcomed by Creative Practitioners.** All attendees welcomed the recognition of creative value being a mix of economic, cultural and social by SCIP partners as an important and dynamic statement, and one that needs to be reinforced across every stage of the business support pipeline.

- **The Role of SCIP vis a vis the Roles of the Creative Industries Federation and the UK Creative Industries Council.** The issues of best and effective representation of the Scottish Creative Industries Sector was raised by some attendees, and there was a request for greater clarity on the role and functions of Scottish Government’s Creative Industries Advisory Group, Scotland’s Creative Industries Partnership and the relationship with the UK Creative Industries Council (UK CIC). Concerns were expressed at the lack of knowledge of the UK CIC agenda and Scotland’s position within it. The work and activity of the Creative Industries Federation was welcomed by attendees, but again there was general support for a formalisation of its representation of Scotland’s Creative Industries. Attendees stated that SCIP has a role in seeking to encourage the Federation to take this position onboard.

- **The role of SCIP on working with SDI and UKTI to promote Scotland’s Creative Industries.** Attendees emphasised a need to understand that there were two
platforms for international support in the UK, and both should be encouraged and promoted by the Scottish agencies – SDI and UKTI. Attendees emphasised there was insufficient knowledge across public agency advisers on the differing promotional practices (and critically the reasons for these) of some of the sub-sectors in the key growth sector. SCIP partners have a role to advocate these differences and seek to secure understanding and support for financing these approaches by the relevant support agencies. The Associations recognise they too have a role in explaining why and how their members need differentiated support. This is an area where a collaborative approach by SCIP and the Associations could be usefully engaged to promote understanding.

- **The role of SCIP to highlight to the Associations key sector opportunities.** Attendees discussed their general lack of awareness of key opportunities for funding and collaborative activity as a consequence of key EU, UK and (to a slightly lesser extent) Scotland-wide opportunities, e.g. Bazalgette Green Paper, AHRC Creative Clusters Call, etc. This speaks to a wider issue of communication and signposting, but critically animating such information. Attendees thought more could be done, either by SCIP or by a more focused Federation in Scotland. Attendees were interested in seeing the proposed Screen Portal on Public Support, recognising that much of the generic support is likely to be common across the creative industries sector. Discussion took place on the growth pipeline and the need to ensure that the conditions for progression were clearly laid out and illustrated by case studies/scenarios to exemplify the range of contexts possible. Attendees were unclear as to whom, how and why some of those attending and others not at the table had received funding from SCIP partners. There was general agreement that a posting on awards made by SCIP partners would be welcome.

**5.4 Update on Creative Industries Skills Investment Plan relative to SCIP**

5.4.1 Skills Development Scotland published the industry-led Skills Investment Plan for Scotland’s Creative Industries in 2015. The Skills Investment Plan distilled the key issues impacting on the sector’s growth and vitality from a skills perspective, highlighting four main themes for industry and Scotland’s public-sector agencies to jointly consider:

- Developing Industry Readiness and Progression
- Addressing the Creative Digital Agenda
- Developing Leadership and Business Skills
- New Approaches to Delivery
An Action Plan was developed identifying partner roles and indicative measures that would be delivered over the three-year life of the plan. We summarise below some of the key SIP outcomes which have been delivered by the SCIP partnership or have been influenced and informed by SIP activity.

5.4.2 Under **Theme One – Developing Industry Readiness and Progression**, SDS reviewed and refreshed some 80 Creative Industry Job profiles on the [My World at Work](#) web service, covering areas as broad as publishing, visual arts, crafts, architecture, film and television, performing arts, games and creative digital technology.

5.4.3 In 2019, My World of Work is being developed to prepare and support young people and adults to consider the challenges and opportunities being created by artificial intelligence, machine learning, automation and data for new occupations. The new service will provide a platform to promote understanding of metaskills, reskilling and upskilling demands and the benefits to industry of developing new, work-based learning solutions to learning and skills acquisition.

5.4.4 SDS & Screen Scotland/Creative Scotland jointly commissioned research into current skills demands across Scotland’s screen industries in 2018, which as well as providing the evidence base for the Screen Scotland Partnership’s new skills strategy, will direct and focus activity on a set of priority occupations which will feature in a revised My World of Work offer for all. As well as featuring job profiles, industry information and practitioner videos, the revised web service will include progression pathways for adults seeking to either transfer, reskill or upskill to the sector, as well as new entrants. This will provide the template for how SDS and its public agency partners will work together to update and include job profiles where there is growing demand across the Creative Industries. SDS, Creative Scotland and Screen Scotland will work to bring these in a new, dynamic way to the widest and most diverse audiences possible. An example of this approach is the agencies’ engagement with the recently launched Creative Careers Programme, led by the Creative Industries Federation, Creative and Cultural Skills and Screenskills.

5.4.5 The SIP emphasised the need to bring forward a sector-relevant, work-based programme for young Scots whilst in secondary education, which would equip them with an early understanding of the industry demands for skills, aptitudes and attitudes; and provide them with opportunities to meet and be in the workplace with practitioners to develop their soft skills. Skills Development
Scotland led on the development of twelve, new Foundation Apprenticeships with industry.

5.4.6 These two-year programmes delivered by Local Authorities and Scotland’s Colleges with employers have proven to be very popular with young people, parents, educators and employers. There are twelve programmes available across the country, including the Foundation Apprenticeship in Creative Digital Media. More information on Foundation Apprenticeships can be found here.

5.4.7 In 2018, SDS committed to work with key partners to deliver 5,000 Foundation Apprenticeship places. SDS has commissioned just under 500 places in Creative Digital Media specifically across the country to commence in Autumn 2019 and engagement with screen-based industries is well underway. There are, however, significant opportunities for partnerships in delivery of this Foundation Apprenticeship across the wider creative economy, tourism and heritage sectors and this year we will also see the piloting of a one-year delivery model across a number of locations and programmes. Foundation Apprenticeships are also available in areas such as accountancy, business skills, IT systems support and software development, all applicable to creative and cultural businesses and agencies.

5.4.8 As well as providing more work-based learning and industry-led activities, the Foundation Apprenticeship will play its part in improving access to Scotland’s Creative Industries sector, through widening and diversifying participation and attainment, creating informed and selective consumers of higher education, but also encouraging creative businesses to work in a new way on their talent development and management pipelines. SDS, SFC, COSLA and the Enterprise Agencies are all supporting this activity. Notably, working to deliver the FA offer in Scotland’s screen sector is a featured item in the Screen Scotland Business Plan published in April 2019. We will work collaboratively to advance this offer across the sector.

5.4.9 Scotland’s Creative Industries are very much at the forefront of the Future Skills debate in Scottish Skills and Education policy and strategy. Much of the sector’s visual arts, crafts, design, architecture and screen industries is highly reliant on graduates from formal arts-based education. Here, studio, production or practice-based learning and experience, high level cognitive, conceptual and analytical thinking is matched by the acquisition of sophisticated, innovative making, manipulation and realisation skillsets in the physical and digital realms. SDS is working with industry, Scotland’s Colleges
and Universities and its partner agencies to achieve this. The development of Skills for The Future and its associated metaskills informs this work. This is perhaps seen most clearly in the redevelopment of Scotland’s Higher National Certificate and Diploma programmes being led by the Scottish Qualifications Authority. Creative Industries will feature in the first phase of this work.

5.4.10 Scotland’s higher-level and further education institutes are adept at supporting the development of rounded, flexible, resilient individuals whose practice is value-based and driven, emotionally intelligent and socially and culturally connected. Their graduates contribute to the creative, cultural and wider Scottish economy, driving innovation and growth across many sectors.

5.4.11 There is a keen debate underway on the sector’s need to genuinely establish diverse and inclusive access, participation and engagement with different communities, people and interests across Scotland. This is true of education, skills and employment routes for new makers in the sector as it is of audiences, markets and consumers of creative content. The need to establish clearer, more flexible education and skills pathways which engage, support and develop the widest range of talent with different voices, experiences and ambitions is essential to the ongoing vitality of Scotland’s creative industries.

5.4.12 The demand for better occupational standards and frameworks, integrating personal, technical, creative, enterprise and employability measures, is a key component in securing Scotland’s ambitions for equality, diversity and inclusion. In 2018, SDS supported the development of new National Occupational Standards and Modern Apprenticeship Frameworks in partnership with Creative and Cultural Skills and Screenskills across technical theatre, venue management, screen and journalism. We also worked closely with Applied Arts Scotland (AAS) on the delivery of apprenticeships with creative micro and SME clusters recruiting people with additional needs, and are supporting AAS to explore how this model could be extended across Rural Scotland, specifically the Orkneys, Perth & Kinross and Dumfries & Galloway.

5.4.13 In support of the SIP’s theme around Developing Leadership and Business Skills, new activities are being delivered with the goal of supporting entrepreneurship, business startups, and embedding a greater and more appropriate mix of employability skills for a wide range of creative graduates and undergraduates. The Royal Conservatoire of Scotland, Glasgow School of Art and University of Arts, London worked jointly on a new innovation and business start-up programme. The Cultural Enterprise Office has also worked directly with the University of West of Scotland and Queen Margaret
University on providing Design Your Practice inputs to their creative undergraduates. Some of these were supported directly or indirectly by Creative Scotland.

5.4.14 Additionally, SDS and Creative Scotland joined the funding partnership led by Scottish Enterprise to support the TRC media Special Edition and Cross Currents executive development programmes in recent years. The former is a specific programme for women and the latter is a creative digital business growth development programme. This has been paralleled by a joint Creative Scotland, SDS and Heritage Lottery Fund partnership to support Arts and Business Scotland’s Organisational Sustainability & Business Skills Development Programme (OSBS), which worked with 12 executives of leading creative and cultural businesses and organizations. These are examples of how SCIP partners worked critically to advance the capacity, capability, resilience and sustainability of the wider sector by investing in the individual development of executive, diverse talent across the sector. As we move forward, we will consider how best to take the learning from these projects in working with Scotland’s Colleges and Universities, sector intermediaries and independent providers.

5.5 Triple bottom line
On celebrating success and learning - the triple bottom line, the Group accepted that there was a need to further research new methodologies to measure and evaluate the “triple bottom line” in Scotland’s Creative Industries. This work is being advanced directly by Creative Scotland, Screen Scotland and by the Creative Industries Policy and Evidence Centre, as well as the AHRC and Industry Strategy Challenge Fund supported Creative Industries Cluster Programme Projects. We look forward to the outcomes of this important work.

5.6 Working with the private sector
In relation to the original aim to look at ways to enhance structured working with the private sector, it was felt by this group that this had been superseded by the creation of the Creative Industries Advisory Group. Members of SCIP had been active in helping to determine the composition of CIAG and CS, SE, SDS and HIE were all observers at CIAG and so there would be effective opportunity to ensure that any issues/themes arising from CIAG will feed through as required for consideration by SCIP in addition to other existing channels of all the SCIP partners.

5.7 The publication of the Enterprise and Skills Review reports; the development of the Skills Planning and Alignment Model between SDS and SFC and the recent
launch of the public agency Strategic Frameworks all emphasise the need for a fresh, collaborative approach to realising the Scottish Government and Enterprise and Skills Strategic Board’s vision of creating a more successful country with opportunities for all of Scotland to flourish through increased wellbeing, and sustainable and inclusive economic growth. Scotland’s creative industries have a key role to play in delivering these outcomes.
Key terms used in this document:

**Creative Industries**: collectively the 16 sectors as defined by the Scottish Government

**Creative Businesses**: individual businesses, both for-profit and not-for-profit, that have a trade in creative products or services at the core of their business.

**Sustainable**: used in the economic sense – e.g. businesses that do not depend on regular state support to exist

Linked plans and strategies

**Scottish Government Economic Strategy Priorities**
- Investing in our people and our infrastructure in a sustainable way
- Fostering a culture of innovation and research and development
- Promoting inclusive growth and creating opportunity through a fair and inclusive jobs market and regional cohesion
- Promoting Scotland on the international stage to boost our trade and investment, influence and networks.

**Creative Scotland Creative Industries Strategy**

Ambition: **For Scotland to be the most positive environment globally for innovative creative businesses of all scales**

Aim 1: Investing together to grow sustainable creative businesses through collaboration and partnership working.

Aim 2: Innovating for the wider economy across all areas of business including the public sector.

Aim 3: Increasing inclusivity; creating opportunity for emergent creative forms and recognising the value of local trading and place-based partnerships.

Aim 4: Increasing international profile and status; opening pathways to global marketplaces.

**Skills Investment Plan for Scotland’s Creative Industries Sector**

Vision: **Developing and retaining a talent pool to support the growth of the Scottish creative sector.**

Theme 1: Developing Industry Readiness & Progression
Theme 2: Addressing the Creative Digital Agenda
Theme 3: Developing Leadership & Business Skills
Theme 4: New Approaches to Delivery
Highlands and Islands Enterprise Creative Industries Strategy

Vision: To establish a vibrant, competitive and sustainable creative economy in Scotland’s Highlands and Islands, which builds upon the energy and traditions of its remote, rural communities and its global connectedness.

Aim: To build the region’s profile and reputation as an exemplar for the successful development of the creative economy in remote, rural regions.

Aim: To support emerging and established creative entrepreneurs with the aptitude, flexibility and tenacity to build dynamic, innovative, sustainable and competitive (disc) creative businesses within the region.

Aim: To leverage more from existing assets and activities, to ensure the most appropriate support for creative businesses is provided across the region and to ensure that HIE sees an appropriate return on its investment.

Further Information and Contacts

The Scottish Government,
http://www.gov.scot/Topics/ArtsCultureSport/arts/Archive/creative-industries

Scottish Enterprise
http://www.scottish-enterprise.com/industry-support/creative-industries

Highland and Islands Enterprise
http://www.hie.co.uk/growth-sectors/creative-industries/overview.html

Scottish Funding Council
http://www.sfc.ac.uk/

Skills Development Scotland
https://www.skillsdevelopmentscotland.co.uk/media/1357158/creative_sip_digital_v4.pdf

COSLA (Convention of Scottish Local Authorities),
http://www.cosla.gov.uk/

VOCAL (Voice of Culture and Leisure)
www.vocalscotland.org.uk/

SLAED (Scottish Local Authorities Economic Development Group)
http://www.slaed.org.uk/
Further information on Creative Scotland’s Funding Programmes can be found at: http://www.creativescotland.com/funding

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