

AR STÒRAS GÀIDHLIG

Luach na Gàidhlig mar so-mhaoin Eaconamach is Shòisealata
- Aithisg deireannach
Cèitean 2014



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean



RO-RÀDH

Dealbh duilleag aghaidh:

A' filmeadh faisg air Tarsgabhaig, An t-Eilean Sgitheanach

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.

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 lomarit 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.

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-ùghdarrais 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.

Ionad Chaluim Chille, Bogh Mòr, Ìle





Fòram Gnìomh Gearrloch agus Loch Iùbh

AITHISG DEIREANNACH

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 (faig

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 (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 sgriobhte.

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.



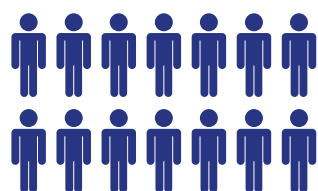
Fidhlean Chill Tighearna, Cùirt an Aodainn, Inbhir Nis

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 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 dearbhadh 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.

"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."



57,365

luchd-labhairt na
Gàidhlig ann an Alba



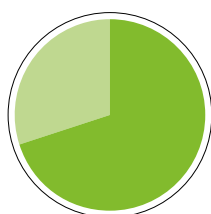
Farpais òran à mion-chànain Cheilteach, Cùirt an Aodainn, Inbhir Nis

AITHISG DEIREANNACH

PRÌOMH THORAIÐHEAN

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 ghnothachasan 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 ghnothachasan (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 FAISG AIR 70%

de na gnothachasan sa cho-chomhairleachaidh gu bheil a' Ghàidhlig an-dràsta na so-mhaoin dhan phrìomh ghniomh gnothachais.



- Thuirte 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 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 thuirte còrr is leth de na buidhnean coimhearsnachd gun robh a' Ghàidhlig riatanach
- Tha na ghnòthachasan 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, dìgiteachd/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.
- Thuirte faisg air 70% de na ghnòthachasan sa cho-chomhairleachaidh gu bheil a' Ghàidhlig na so-mhàin dhan phrìomh
- ghnìomh ghnòthachais/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.



THUIRT CÒRR IS LETH

de na ghnòthachasan is gnìomhachasan san t-suirbhidh gun robh Gàidhlig air a cleachdadh, no a' nochdadh, mar phrìomh eileamaid de phrìomh ghnìomhan, stuthan no sheirbheisean na buidhne.

Faodadh gu bheil an luach eaconamach comasach aig a' Ghàidhlig mar so-mhàin do dh'eaconamaidh na h-Alba eadar

£82M - £149M

MHÌNICH FAISG AIR DÀ-THRIAN

ris an deach co-chomhairle a dhèanamh gun robh a' Ghàidhlig glè chudromach, fìor chudromach no riatanach a thaobh soirbheas an cuid ghnòthachas no gnìomhachas.



Fàs aig Sabhal Mòr Ostaig, An t-Eilean Sgitheanach

Tha na dòighean sa bheil a' Ghàidhlig air a cleachdadh le gnothachasan is gnìomhachasan gu math eadar-dhealaichte,

eadar a bhith mar fhòcas sa ghnìomhachas gu bhith a' tabhann beagan a bharrachd do fheartan àraid den ghnìomhachas.

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

A' Ghàidhlig gu follaiseach aig cridhe/bun a' ghnòthachais

- far a bheil a' Ghàidhlig (mar chànan, cho math ri ceòl Gàidhlig, dualchas Gàidhlig, tachartasan Gàidhlig, m.s.a.a.) bunaiteach dhan ghnìomhachas.

A' Ghàidhlig mar fheart dualach/fillte den ghnòthachas

- far an robh buaidh is misneachadh aig a' Ghàidhlig (cànan, cultar is dualchas) a thaobh a' ghnìomhachais no neach-seilbh a' ghnòthachais.

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 ann an soidhnichean airson a' ghnòthachais - leatha fhèin no ann an soidhe dà-chànanach.

Cleachdadh na Gàidhlig ann an sanasachd, adhartachadh agus margaidheachd - leatha fhèin no gu dà-chànanach.

A' Ghàidhlig mar chànan an aite-obrach - far a bheil a' Ghàidhlig na cànan conaltraidh eadar luchd-obrach taobh a-staigh a' ghnòthachais.

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, chuirmean, fhèisean, m.s.a.a.

A' Ghàidhlig air a cleachdadh taobh a-staigh a' ghnòthachais no air ainmean stuthan - a' gabhail a-steach ainmean gnothachais, ainmean stuthan no seirbheisean, branndadh, suaidheachantasan companaidh, m.s.a.a.

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.

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' chàinain, a' gabhail a-steach cleachdadh na

Gàidhlig taobh a-staigh ghnòthachasan, ach cuideachd san fharsaingeachd (m.e. anns na meadhanan), ann am foghlam (i.e. Foghlam Meadhan Gàidhlig) agus sa chomannshòisealta nas fharsainge.

- Tha creideas a tha a' sìor fhàs a' nochdadh ann an ghnòthachasan is buidhnean a tha a' cleachdadh na Gàidhlig gu bheil seo fhèin (cleachdadh na Gàidhlig le ghnòthachasan 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':

1

Cur ri cho sònraichte/àraid 's a tha stuthan is seirbheisean.

2

Cur ri aithneanas a thaobh cinnteachd is tùs nan stuthan/seirbheisean.

3

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 rinnear co-chomhairle, agus còrr is leth de na buidhnean coimhearsnachd.

Thuir còrr is 60% de ghnòthachasan gun robh cleachdadh na Gàidhlig/ceangal ris a' Ghàidhlig a' cur ri luach na Gàidhlig sa choimhearsnachd. 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 ìomhaigh a' chànan (70% de luchd-freagairt ag aontachadh gu làidir).
- Ag àrdachadh mothachadh a thaobh a' chànan (70% de luchd-freagairt ag aontachadh gu làidir).

- Ag àrdachadh luach sòisealta a' chànan (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 cosnadh 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 ìomhaigh, mothachaidh, cleachdaidh, meas agus luach sòisealta a' chànan.

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 cosnadh 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' chànan.

60%

thuir còrr is 60% de ghnòthachasan gun robh cleachdadh na Gàidhlig/ceangal ris a' Ghàidhlig a' cur ri luach na Gàidhlig sa choimhearsnachd.

72%

àrdachadh 72% pròis ann an coimhearsnachdan ionadail le buidhnean cleachdadh na Gàidhlig.



Làrach Inbhir Nis

AITHISG DEIREANNACH

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 shònraichte is eadar-dhealaichte sa tha i, agus an tarraing do luchd-turais gus tadhal air àiteachan shònraichte (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 ghniomhan 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:

- Dith chothroman 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 dhith gus dreuchd na Gàidhlig sa ghnòthachas a leasachadh.
- Na th' ann an-dràsta (dith) de dh'eòlas is ealantas a thaobh na Gàidhlig taobh a-staigh a' ghnòthachais no na buidhne. Tha dith 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 iarrais. Cuideachd, dith luchd-labhairt leis na sgilean iomchaidh, sònraichte a tha dhith airson a' ghnòthachais.

- Cnapan-starra is ceistean cultarail – a' bualadh air ceistean fìor is mothachail a thaobh misneachd, cur an aghaidh atharrachaidh, dith prìomhachais is taic ga thoirt don Ghàidhlig, dith mothachaidh taobh a-staigh ghnòthachasan mu chomasan airson na Gàidhlig, uallach mu chomharradh airson an adhbhair cheàrr agus làimhseachadh cùmhach de Ghàidhlig mar so-mhàoin 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 fharsainghe bho bhith a' cuideachadh le togail inbhe is cumail suas a' chàin; 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 gnothachasan stèidhte agus an leasachadh càin 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.





Abhainn Inbhir Èireann

AITHISG DEIREANNACH

A' CAINNEACHADH LUACH EACONAMACH NA GÀIDHLIG MAR SO-MHAOIN

[1] 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.

[2] 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.

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 chiumseach no mar riochdachadh den eaconamaidh nas fharsainghe.

Ged a thuirt 70% de na gnothachasan san t-suirbhidh gu bheil cleachdadh na Gàidhlig a' riochdachadh so-mhaoin dhan phrìomh ghnìomh den ghnòthachas/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-trìan de na gnothachasan a tha a' measadh Gàidhlig mar so-mhaoin air tomhas air choireigin a thoirt air luach na Gàidhlig dhan ghnòthachas, 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 bhuaidh 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 bhuaidh 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-tharachais. 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 ghnòthachasan eadar an dà bhuidhinn stèidhte air: aithne do Ghàidhlig mar so-mhaoin, làthair cruinne-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 [1].
- 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 [2].



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 bhuaidh na Gàidhlig airson na 51 ghnòthachasan/iomairtean timcheall air £5.6 millean.

Chaidh measadh a dhèanamh air an luach eaconamach comasach dhan eaconamaidh nas fharsainghe 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.
- 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 eadair luach sa cheud de luach teachd-a-steach a tha ghnòthachsan a' faighinn às leth na Gàidhlig agus a' cur seo an cèill dhan eaconamaidh nas fharsainghe.
- 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 air 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 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 thuairmse 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 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 ghniomhan 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) ghnòthachasan 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 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

- An Lantair, Steòrnabhagh
- Ionad Luchd-turais is Ealain Àrais, An t-Eilean Sgitheanach
- Celtic Connections, Glaschu
- Facal, Cataibh
- Fèisean nan Gàidheal agus Blas
- Fèis HebCelt, Steòrnabhagh
- Media nan Eilean (mneTV), Glaschu
- Taigh-òsta Port Charlotte, Ìle
- Praban na Linnie, An t-Eilean Sgitheanach
- Sabhal Mòr Ostaig, An t-Eilean Sgitheanach
- Sealgar, Leòdhas
- Ionad Turasachd Seallam, An Taobh Tuath, Na Hearadh
- Stòras Uibhist
- Taigh Chearsabhaigh, Uibhist a Tuath

Gearr-chunntasan Raoin/ Sgrùdaidhean-cùise

- Mòr-ionad Cultarail Gàidhlig
- Roinn Foillseachaidh na Gàidhlig
- Roinn Meadhanan na Gàidhlig
- Gàidhlig agus Uisge-beatha Albannach
- Roinn Turasachd

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EXAMPLES OF GAELIC AS AN ECONOMIC AND SOCIAL ASSET

The full 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).

Sectoral Overviews/Case Studies

- Gaelic Cultural Hubs
- Gaelic Publishing Sector
- Gaelic Media Sector
- Gaelic and Scotch Whisky
- Tourism Sector

Individual Case Studies

- An Lannair, Stormoway
- Aros Visitor Centre and Arts Centre, Skye
- Celtic Connections, Glasgow
- Facal, Sutherland
- Feisean nan Gàidheal and Blas HebCeit Festival, Stormoway
- Media nan Eilean (mneTV), Glasgow
- Port Charlotte Hotel, Islay
- Praban na Linne, Isle of Skye
- Sabhal Mòr Ostaig, Isle of Skye
- Sealtig, Isle of Lewis
- Seallam Visitor Centre, Northton, Harris
- Stòras Uibhist
- Taigh Chearsabhagh, North Uist.

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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 undermined 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.

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.



QUANTIFYING THE ECONOMIC VALUE OF GAELIC AS AN ASSET

[1] 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.

[2] 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.

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.

- Turnover: £1.7 million (leading to a combined total of £3.1 million for Eilean Siar when the matched respondents [1] 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 [2] are added together).

- 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 experience; 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.



Culture Day, Moray

OPPORTUNITIES TO USE GAELIC AS AN ASSET

EXECUTIVE SUMMARY

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.

Isle of Skye Ferry





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).

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 local communities (72%); 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.

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.

60% of businesses stated that business use of/association with Gaelic enhances the value of Gaelic in the community.

72% increase in pride within local communities by the use of Gaelic by organisations.

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.
1	2	3

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



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.
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Digital Showcase in Naim Arts and Community Centre

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:

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

ALMOST TWO THIRDS

of businesses consulted describe Gaelic as moderately, very, or critically important to the success of their business.

£82M AND £149M

Potential economic value of Gaelic as an asset to the Scottish economy could be in the region of between

the businesses and enterprises surveyed stated that Gaelic is used, or features, as a key element of their main activities, products or services.

MORE THAN HALF



- 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.





Killearn Fiddlers, Eden Court Theatre, Inverness

EXECUTIVE SUMMARY

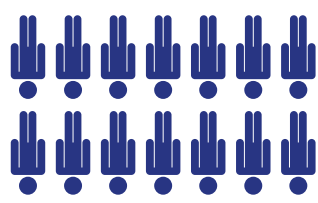
KEY FINDINGS

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).



ALMOST 70% of businesses consulted said that Gaelic is currently an asset to their business.



57,365
Gaelic speakers
in Scotland

"Gaelic has shown a remarkable resilience in the face of challenges set against it historically and in the modern era."

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.



Cuillin FM studio, Portree, Isle of Skye

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.

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.

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 community of Gleneel in the Scottish Highlands twinned itself with Gleneel on Mars and hosted an event entitled "Space, Stars and Mars". (L-R) Emma Maclean (local development officer and event organiser), Bonnie Dunbar (former astronaut) and Prof John Brown (Astronomer Royal) opened the event.



EXECUTIVE SUMMARY

INTRODUCTION

Front cover image: Abhainn Dearg Distillery, Isle of Lewis

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.

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.

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. 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.

Inverness Campus, Inverness



ÀR STÒRAS GÀIDHLIG

The economic and social value of Gaelic as an asset
– Executive summary
May 2014

Highlands and Islands Enterprise
Iomairt na Gàidhealtachd's nan Eilean



pirnie limited

