

Considering a Scottish
Cultural Export Service



Something similar, but different



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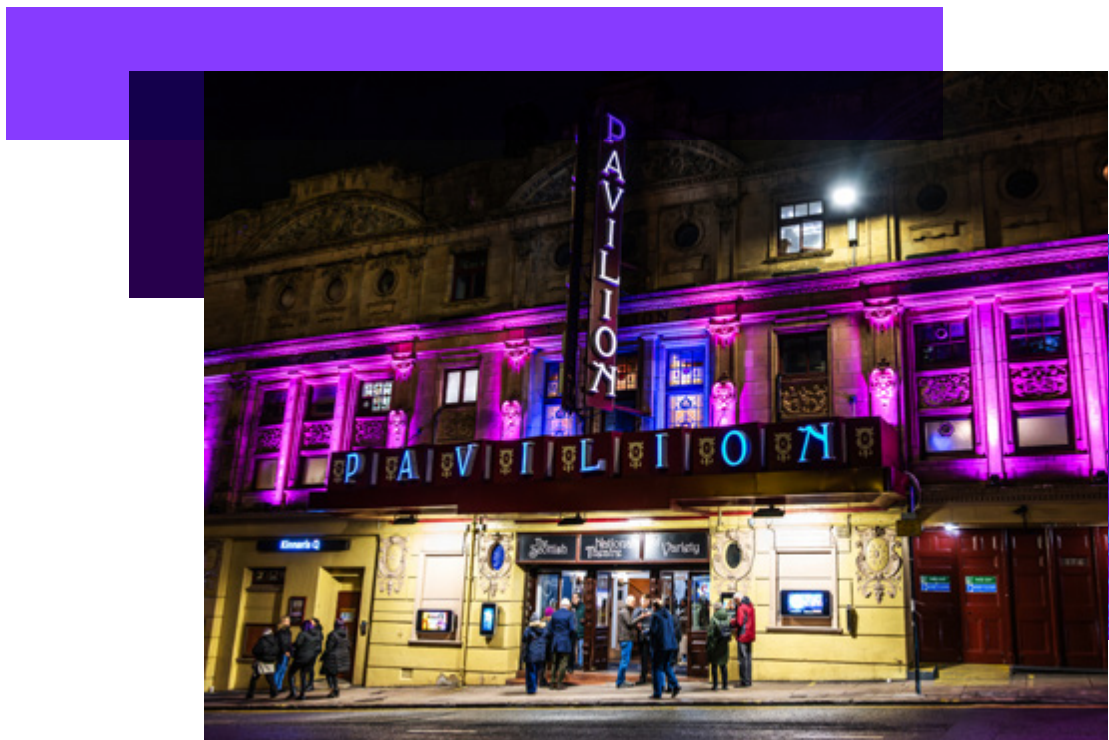
Table 1. Responses to survey question: Where are you/your organisation primarily based?

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Preface

This report began as a focused piece of work: a scoping exercise, commissioned by the Scottish Government in partnership with the British Council, to explore whether a dedicated cultural export service might be worth establishing. The question was straightforward enough. The answers, less so.

What emerged from the research through a substantial sector survey – 21 consultation groups (with 68 attendees), 13 in-depth interviews – and a wide programme of desk research across comparator countries – was something more nuanced, complex, and more interesting than a simple case for a new agency. Scotland already has considerable international cultural activity. It has organisations doing genuinely excellent work. It has talent, reach, and a global reputation that, in certain contexts, punches well above the country's size. What it lacks, it became clear, is the infrastructure to convert that talent and reputation into sustained international careers, consistent market presence, and equitable access to opportunity for the full breadth of its creative sector.



The people who spoke to us during this research were generous, candid, and often quite frustrated. They described a landscape bound by informal networks and the goodwill of individuals who happened to know the right people. They described funding systems that are well intentioned but often poorly calibrated for the speed at which international opportunities emerge and dissolve. They described the compound effect of Brexit and Covid as structural disruptions that have permanently altered how the sector engages with the world. And they described the growing anxiety, particularly among emerging practitioners, that international work simply isn't for them.

This report is not a business plan, nor a detailed implementation blueprint.

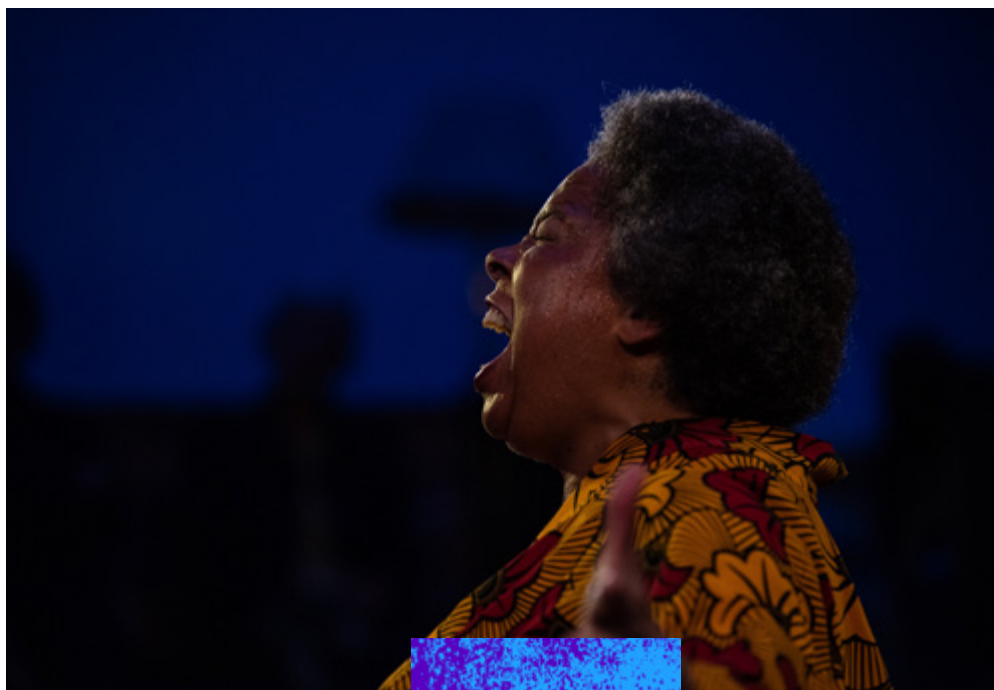
It is a structured assessment of need, context, and options, designed to inform a decision about what direction Scotland should travel in, and the beneficial impacts that might have. The four models set

out in Section 6 are different in their ambition, structure, and cost, and are intended to provide real choices rather than variations on a single predetermined answer.

One phrase, offered by a participant in a dance and theatre consultation group, stayed with us throughout the writing of this report: 'It's simple, you know, we need something similar but different.' Similar, in the sense that successful models exist elsewhere and Scotland does not need to invent from scratch. Different, in the sense that Scotland's particular geography, cultural ecology, policy context, and post-Brexit position require something genuinely tailored rather than copied and transplanted. That (creative) tension, between learning from others and building something that actually fits, runs through this report.

We are grateful to everyone who contributed their time, knowledge, and experience to this process. We are particularly indebted to Norah Campbell of the British Council for her unstinting guidance, support, input, and co-ordination. The sector's willingness to engage, even amid significant pressures on time and resource, speaks to the importance it places on getting this right. We hope this report does justice to what we heard.

Bryan Beattie, Dr Kyla Tully, and Therese Kearns
Creative Services (Scotland) Ltd and Queen Margaret University
August 2026



Executive summary

Key findings

The evidence points to five headline findings:

- Scotland's export ecosystem is fragmented.
- Brexit and Covid created lasting barriers.
- Funding is poorly aligned to export realities.
- Informal networks dominate access.
- Comparator nations invest strategically in export infrastructure.

Each of these findings is set out in more detail below.

Contributions from respondents, whether through questionnaire, 1-2-1 or focus group meeting, showed a remarkable consistency across the various issues. They found that Scotland's cultural export activity is extensive but fragmented. Support is spread across multiple bodies with different international aims – Creative Scotland, British Council Scotland, Scottish Development International, sector agencies, and others – with no single point of access, no co-ordinating intelligence, and no strategic authority to act at commercial speed. International opportunity is accessed primarily through informal networks, creating a system in which who you know matters more than what you make.

Brexit and Covid have caused lasting structural damage. New logistical and financial barriers have made international touring significantly more expensive and administratively complex, while the failure of networks during the pandemic has left a generation of emerging practitioners without the experience base or connections to engage with international work.

Respondents consistently found that funding is insufficient, inaccessible, and poorly aligned with how cultural export actually works. Response timelines are too slow for the pace at which international opportunities arise, and many no longer consider it a realistic option. Scottish applicants receive a disproportionately small share of UK-wide export funds, and the current system forces practitioners to choose between domestic and international opportunity rather than enabling both.

Respondents felt a persistent tension exists between cultural support bodies, which lack commercial understanding, and commercial support bodies, which lack cultural understanding. Sectors that straddle these territories such as games, music, publishing, and crafts, consistently fall between institutional remits.

The relational infrastructure underpinning Scotland's international cultural activity is felt to be informal, concentrated in a small number of individuals, and at risk of being lost without deliberate succession planning. Investment in domestic talent development and digital engagement, both identified as lagging behind competitors, is a precondition for sustainable export growth.

Comparator countries – Ireland, Australia, Norway, South Korea, Canada, and New Zealand – demonstrate that deliberate, funded, strategically coherent cultural export infrastructure produces measurable results in terms of careers, earnings, co-productions, and national reputation. Scotland is currently operating without equivalent provision.

Why a Scottish Cultural Export Service

Scotland exports culture whether or not it has a service to support the process. Scottish artists tour, exhibit, publish, pitch, and collaborate internationally every year. The question this report addresses is whether it should do so more strategically, with the infrastructure, funding, and co-ordination required to convert existing strength into consistent, equitable, and sustainable international presence.

The case for intervention rests on several interconnected arguments, the first of which is market failure: without structured support, international opportunity defaults to those with existing networks and resources, systematically excluding emerging practitioners, smaller organisations, and those from outside the Central Belt. There has also been structural disruption: Brexit and Covid imposed new costs and barriers that the market cannot absorb unaided, and which disproportionately affect those with the least institutional resilience.

Other countries have already more advanced forms of a cultural export service, which creates a competitive disadvantage: comparator nations provide co-ordinated, funded cultural export infrastructure that enables their artists to access international markets at lower cost and with greater strategic coherence, which means Scottish artists are increasingly competing at a disadvantage.

There is economic and reputational opportunity: Scotland’s creative sector is a significant contributor to GDP, employment, and international reputation, but its export potential is substantially unrealised. Perhaps most significantly for the purposes of this study, there is the issue of policy commitment: Scotland’s International Culture Strategy 2024–30 commits explicitly to establishing an export support service, and this report provides the evidential and structural basis for that commitment to be honoured.

The risk of continued inaction may lead to the gradual attrition of Scotland’s international cultural presence, the loss of a generation of practitioners who cannot access the support needed to sustain international careers, and the further entrenchment of inequality within the sector.

The table below summarises the case for intervention.

Case for intervention	Summary
Market failure	Without structured support, international opportunity defaults to those with existing networks and resources, excluding emerging practitioners and smaller organisations
Structural disruption	Brexit and Covid imposed new costs and barriers that the market cannot absorb unaided, hitting those with least institutional resilience hardest
Competitive disadvantage	Comparator nations provide co-ordinated, funded cultural export infrastructure, meaning Scottish artists increasingly compete at a disadvantage
Economic and reputational opportunity	Scotland’s creative sector is a significant contributor to GDP, employment, and international reputation, but its export potential is substantially unrealised
Policy commitment	Scotland’s International Culture Strategy 2024–30 commits explicitly to establishing an export support service; this report provides the evidential basis to honour that commitment

Summary of options

This report sets out four distinct structural options for a Scottish Cultural Export Service, each with a different operating logic, governance model, funding range, and risk profile. They are not variations on a single answer: they represent genuinely different choices about the scale, nature, and ambition of Scotland's intervention.

The **Commissioning Core Model** establishes a small, expert-led body – the Scottish Cultural Export Partnership – that acts as a commissioning and brokerage hub within a wider decentralised ecosystem. Operating with a lean staff of four to six specialists, it proactively identifies high-potential export opportunities, commissions structured packages rather than distributing open-ended grants and works at commercial speed. Estimated annual cost: £4–6 million.

The **Global Culture Platform Model** is a system-building model that aligns digital infrastructure, co-production treaties, diaspora networks, and city-based cultural hubs into a co-ordinated national export architecture. Rather than a single agency, it establishes five strategic strands co-ordinated through a small Strategic Export Unit and a formal inter-agency Cultural Export Council. It is the most ambitious and longest-horizon option. Estimated annual cost: £8–10 million.

The **Cultural Export Accelerator Model** focuses on removing structural friction rather than distributing subsidy. It operates through four interconnected drivers: a market gateway and representation network; a risk-sharing and deal support facility; an export readiness and commercial capability programme; and a brand repositioning mechanism. It is the most commercially oriented model. Estimated annual cost: £4–6 million.

The **Cross-Sector Hybrid Model (Music-First Phase)** establishes a national Scottish Cultural Export Service with a fully staffed Music Export Division as its primary operational arm, expanding to other sectors in phases as funding and infrastructure allow. It responds to music's immediate export scale and readiness while maintaining cross-sector strategic coherence. Estimated annual cost: £6–7 million.



Headline recommendations

The evidence gathered through this research is sufficient to justify a clear recommendation: Scotland should establish a dedicated Scottish Cultural Export Service. The case for doing nothing is not compelling, the comparator evidence is consistent, and the sector's demand for structured support is unambiguous.

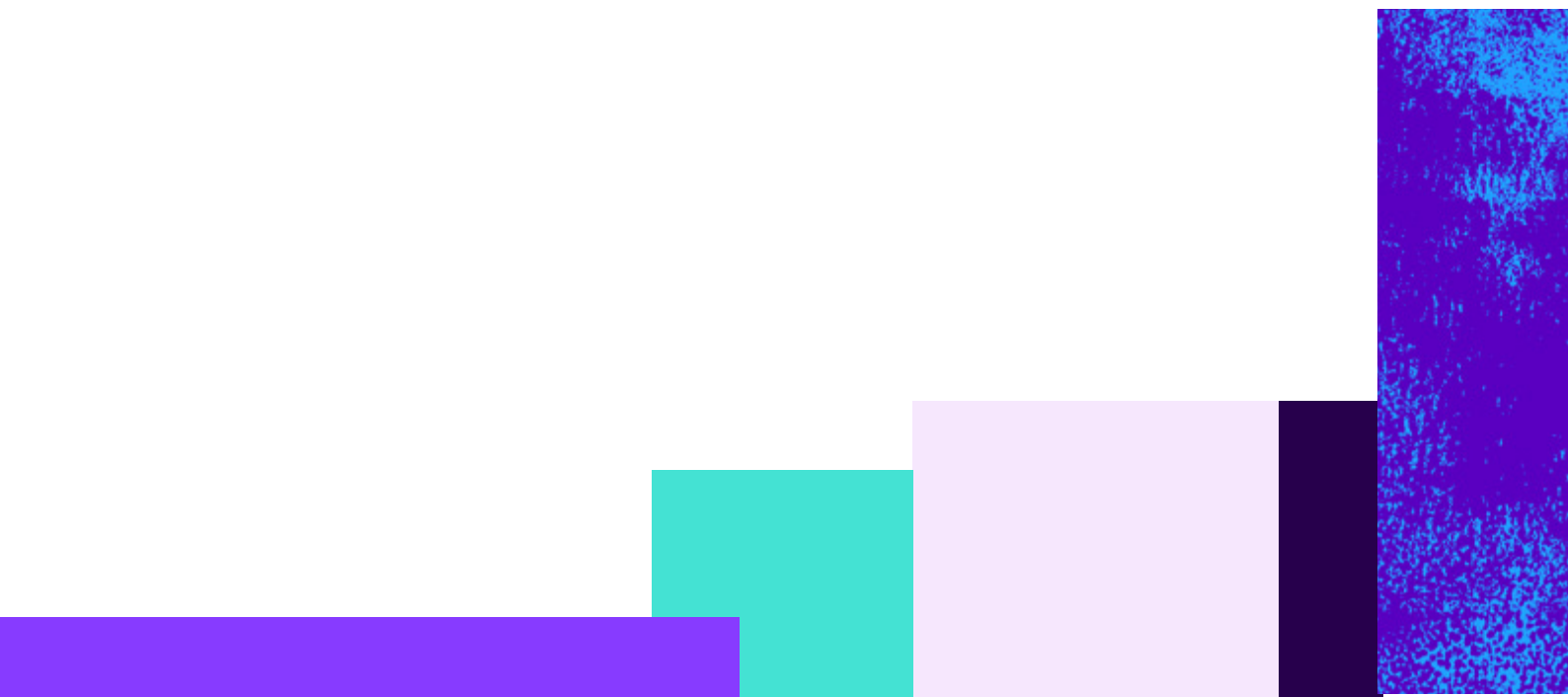
Of the four models presented, the research team's assessment is that the Cross-Sector Hybrid Model (Music-First Phase) offers the strongest balance of immediate impact, deliverability, and scalable architecture. Music provides a sector with immediate export scale and readiness; the hybrid structure ensures that political and sector-wide legitimacy is maintained from the outset; and the phased expansion framework provides a directional pathway to full multi-sector provision.

The **Commissioning Core Model** is the recommended alternative if government appetite for a full new body is limited at this stage: it delivers strategic co-ordination and commercial capability at lower cost and with a smaller institutional footprint. It should be considered a viable first phase rather than a lesser option.

Whatever model is chosen, five essential design requirements offer a clear foundation:

- The service must provide a single, clear point of access.
- Funding mechanisms must be fast, flexible, and aligned to how international opportunity actually works.
- The service must explicitly bridge creative and commercial expertise.
- It must be designed from the outset to serve practitioners at all career stages and organisational scales.
- It must formalise and protect the relational infrastructure on which Scotland's current international activity depends.

The immediate next step is a decision in principle on which model or direction to pursue, followed by a co-design process with the sector, and a funding commitment sufficient to allow a credible pilot to be established within 12 months of that decision.



Introduction



Introduction

1.1 Purpose of the study

As part of the International Culture Strategy's action plan, the Scottish Government committed to explore the establishment of a support service for cultural export and exchange. Representatives of the Scottish culture sectors have identified the need for greater support for international activity and specifically with cultural export, post Covid-19 and Brexit. To overcome the increased barriers to exporting that have emerged, support needs include access to current expert advice and information, funding, identifying showcasing opportunities and supporting international networking. A bespoke service to support cultural export and exchange would be well placed to deliver this.

While there is a clear demand for support with developing more export opportunities, needs will vary depending on existing initiatives, networks, business models (sole traders and SMEs), international markets, and other specific factors for each art form (sub-sector) within the cultural sector. Therefore, the brief for this study identified a need for robust and objective research to identify the key gaps and consider the scope and desired functions of such a service.

The brief suggested further data is required to consider whether a targeted approach would be most impactful, or whether a broader service for the arts and cultural sector is needed. It identified that a future service will need to address the greatest need in the sector, while also delivering value for money and enable the best outcomes and impact with available budgets.

This scoping exercise, therefore, identifies priorities, outlines the pros and cons of a targeted or broader approach, and considers the option for a pilot programme that would inform the establishment of a new service that has the flexibility to develop.

1.2 Commission and methodology

In response to the Scottish Government's International Cultural Strategy Cultural Plan, the Scottish Government invited British Council to undertake a scoping exercise exploring the establishment of a dedicated Export Service for Scotland's arts and culture sectors. To complete this exercise, a consultancy team comprising researchers from Creative Services Scotland and Queen Margaret University was commissioned to examine the challenges and opportunities facing Scottish cultural organisations and artists in accessing international markets, identify gaps in current support, and develop recommendations for a new service to boost cultural exports.

The study methodology is designed to deliver a rigorous, inclusive, and sector-informed scoping study that identifies the needs, gaps, and potential models for a Scottish support service for cultural export and exchange. This report therefore draws on four approaches to data collection and knowledge generation: desk research; sector survey; sector-specific consultation groups; and interviews with local and international export stakeholders. All data collection took place following approval from Queen Margaret University's Ethics Committee.

Desk research

An initial review was undertaken of published research, statistical data, and relevant policies relating to cultural export and exchange. This facilitated the development of case studies and a broader grounding of established understandings and approaches to cultural export.

Sector survey

A 40-question online survey was developed and administered using the Jisc survey platform. The survey captured the views of 64 individuals and 60 organisations involved in the arts and cultural sector in Scotland. Respondents provided insights into perceived challenges and opportunities relating to engaging with cultural export, alongside information about their geographic contexts and the nature of their professional practice. A full list of survey questions is included in [Appendix A](#).

The survey ran from 19 January to 3 April 2026. It was distributed through the networks of the British Council, other sector bodies, and through respondent referrals.

Consultation groups

Alongside the live survey, 68 stakeholders participated in 21 online consultation groups. Participants were drawn from sector recommendations and from those who expressed interest in taking part in further discussions outwith the survey. The focus groups were designed to explore sector-specific experiences of cultural export in greater depth and to consider potential future pathways for approaching cultural export in Scotland.

The groups were sector-specific, representing organisational leaders and practitioners from across the creative and cultural industries such as design, gaming, literature, dance, music, publishing, and theatre.

Interviews

Alongside and following the live survey, 13 stakeholders participated in online interviews. Participants were drawn from comparative interest identified through desk research, sector recommendations, and from those who expressed an interest in taking part in further discussions outwith consultation groups. The interviews were designed to gather in-depth detail regarding sector-specific experiences of cultural export and to gather information on experiences of those not represented within the survey. The individuals interviewed represented gaming, film and TV, music, festivals, literature, crafts, theatre, dance, and enterprise.

Limitations

The findings should be interpreted in light of several limitations:

- Participation was self-selecting, and respondents were therefore more likely to have a pre-existing interest in international activity than the wider cultural sector.
- Engagement was geographically concentrated within the Central Belt, with lower representation from several local authority areas and island communities.
- Certain sectors were more strongly represented than others, particularly performing arts, music and visual arts, while areas such as heritage, film and TV, and games relied more heavily on interview evidence.
- This study was designed as a scoping exercise and not as an economic impact assessment. It therefore does not provide a definitive estimate of the potential economic contribution of a future service.



- The study focused primarily on stakeholder perceptions and experiences. While these provide valuable evidence, perceptions of barriers and support needs may not always align with measurable system performance.

1.3 Scope and definitions

For the purposes of this research, the term ‘cultural export’ is used in a broad and inclusive sense and it underpinned conversations with survey respondents and focus group participants. Based on a definition established by the British Council, it frames cultural export to mean:

The sharing, exchange, sale, or international circulation of Scotland’s cultural work, skills, knowledge, and creative practice in physical, digital, or relational forms. This can include (but is not limited to):

- touring performances, exhibitions, or festivals
- international commissions and co-productions
- digital distribution (streaming, games, online platforms)
- licensing, formats, and intellectual property
- skills, expertise, and professional services
- education, training, and knowledge exchange
- heritage, traditional arts, and language-based work
- long-term international partnerships and networks.

Cultural export does not have to be commercial to be valid. It may be:

- artist led or organisation led
- publicly funded, commercially funded, or mixed
- one-off or long term
- small scale or large scale.

1.4 Report structure

The report is structured in ten sections.

Section 2: Strategic context situates the study within Scotland's existing policy framework, mapping the current cultural export ecosystem across culture-specific, business-specific, and sector-specific organisations, agencies, and programmes.

Section 3: Evidence from stakeholder engagement presents findings from the sector survey, 21 consultation groups, and 13 interviews. It synthesises evidence across key themes and identifies five priorities for a future service.

Section 4: Case studies of existing international systems examines cultural export infrastructure in 8 comparator countries and territories – Northern Ireland, Wales, the Republic of Ireland, Norway, Canada, South Korea, New Zealand, and Australia – selected for their relevance to Scotland's scale, context, and ambitions.

Section 5: Implications for Scotland draws together key findings, strategic design principles for a future service, opportunities for intervention, and the risks of inaction.

Section 6: Options for a Scottish Cultural Export Service presents four fully described structural options: the Commissioning Core Model; the Global Culture Platform Model; the Cultural Export Accelerator Model; and the Cross-Sector Hybrid Model (Music-First Phase).

Section 7: Comparative assessment of options evaluates the four models against the criteria of strategic fit, deliverability, cost and scalability, sector impact, and risk.

Section 8: Decision summary distils the report's recommendation into a single decision-ready summary, covering the recommended option, rationale, rejected alternatives, indicative costs, delivery timetable, governance proposal, and success measures, for use in ministerial or board-level decision-making.

Section 9: Conclusions and next steps sets out the report's findings, preferred direction, and immediate actions required to translate this scoping exercise into a viable implementation process. Appendices provide full survey questions, references and sources, and detailed international case study material.



Strategic context



Strategic context

2.1 Cultural export in its policy context

Inspiring Connections: Scotland's International Culture Strategy 2024–30 is the Scottish Government's first comprehensive international culture strategy. It emerged from international ambitions in Scotland's 2020 Culture Strategy and was developed through extensive consultation with the cultural sector carried out in 2023. The strategy is structured around the three aims of: a more sustainable and stronger cultural sector, a diverse international sector that benefits people and communities, as well as an enhanced international reputation globally. These strategy aims are integral to the long-term resilience and development of Scotland's creative sector. As part of the new culture strategy, the Scottish Government has committed to increasing funding to the culture and arts sector by £100 million per year by 2028/29, building on uplifts of £15.8 million in 2024/25 and a further £34 million in 2025/26.

Cultural exports are recognised as a significant and fast-growing component of Scotland's economy, accounting for 4.7 per cent of total Scottish exports in 2021. The strategy adopts a broad interpretation of what constitutes a cultural export, encompassing touring, international exhibitions, screen co-productions, the sale of physical goods, and inbound cultural tourism, reflecting the diversity of ways in which Scotland's creative sector engages with international markets.

Beyond the economic case, the strategy emphasises that international exchange is equally important for creative development, innovation, building networks, and enabling practitioners to access new ideas and collaborative opportunities.

The strategy highlights the significant challenges facing the cultural sector and positions international strategy as a mechanism to tackle the following issues: Brexit has imposed significant practical barriers, including new visa and work permit requirements for touring artists and the loss of access to Creative Europe and Erasmus+. These structural challenges have been compounded by the lasting financial impact of the Covid-19 pandemic and ongoing financial pressures across the sector. Climate change presents a further tension, as Scotland's creative sector is committed to achieving net zero by 2045, yet meaningful international collaboration is difficult to sustain without international travel. The strategy also positions international cultural exchange as part of Scotland's broader engagement with its colonial past, recognising that artistic collaboration and dialogue with communities affected by Scotland's historic role in empire and slavery is an important dimension of this international work.

On support infrastructure, the strategy acknowledges that while existing export mechanisms have delivered results with reference to partnerships such as Momentum and Push, and as case studies, as well citing Edinburgh's vibrant festival scene, there is a significant gap in dedicated cultural export support. It commits to undertaking a feasibility study into a new export support service for the sector, drawing on successful models from other countries to develop an approach suited to Scotland's scale and ambitions (of which this study is the consequence).

2.2 Mapping Scotland's existing cultural export ecosystem

As will be reflected upon further throughout this report, the current approach to cultural export within Scotland can be understood as an ecosystem of actors and funding programmes that facilitate international work. This is also reflected within Scotland's 2024 International Cultural Strategy, Inspiring Connections (Scottish Government, 2024), which outlines the current key players in Scotland supporting cultural exports such as Creative Scotland, Historic Houses, the British Council, and Brand Scotland. The strategy also comments on the potential for international offices to globally link to diaspora. However, despite a commitment to invest an additional £100 million in the cultural sector by 2028/2029, the policy does not offer a dedicated cultural export system model to deliver the goals of the strategy.

A further complication is presented with the broad understanding of cultural export activities. In reviewing sector activities, policy aims, and funding programmes across Scotland's cultural sector, only a portion of cultural export work is explicitly framed as such: many funding pots, programmes, or other export facilitators are not ringfenced or clearly linked to such activities. Additionally, cultural export activities and spending do not appear to be tracked in a centralised manner to concretely reflect economic activity, much less the labour of facilitation, development, and support. As such, this section offers a broad overview of key actors and programmes within Scotland's cultural export ecosystem but is not a definitive list.

2.2.1 Culture-specific-related organisations, agencies, and programmes

2.2.1.1 British Council

The British Council is the people of the UK's cultural relations organisation connecting Britain to over 100 countries globally. Its strategy is to build peace, trust, and prosperity by connecting the UK with people all over the world through arts, education, and English teaching. In Scotland, the British Council plays a strategic role in platforming and connecting Scotland's artistic and cultural scene to international audiences through the following programmes:

- **Momentum International Delegate Programme** is a partnership between Festivals Edinburgh, Creative Scotland and British Council, with additional support from EventScotland and City of Edinburgh Council. Since its foundation in 2011, the programme has brought over 700 delegates to Edinburgh during the world's largest arts festival in August, creating opportunities for networking, knowledge exchange and future collaborations. Each delegate gets their own tailored schedule of events and activities to help foster partnerships. There is also a follow-up fund available to delegates, provided jointly by British Council and Creative Scotland, to help build on conversations and ideas developed with Scottish partners during their visit.
- **International Performing Arts Delegation** is run by the theatre and dance team and hosts 26 international industry delegates with a focus on seeing tour-ready UK work at the Edinburgh August Festivals (e.g. Made in Scotland showcase). International delegates are programmers and arts directors in a position to book shows for their venues and festivals. The programme also provides follow-up funding to help UK work to tour.
- British Council Scotland also holds a formal **International Strategic Partnership** with Creative Scotland, which focuses on longer-term development including shared geographic priorities, research and knowledge sharing, and international advocacy.
- **International opportunities:** British Council Scotland promotes a range of international opportunities to the sector, including Connections Through Culture grants and other open funding calls, British Pavilion in Venice Fellowships, inbound and outbound delegations, and UK Bilateral Seasons (for example, Brazil, Poland, and Saudi Arabia). Scotland performs well in securing funding and participation across these opportunities.

- **Scotland + Venice:** This is a long-running international platform that presents contemporary Scottish art and architecture to global audiences at ‘the Olympics of the art world’. Established in 2003, it supports the creation of new work, builds international networks and exchanges, and professional development opportunities for emerging curators and affirms Scotland’s standing as a place of significant creative and cultural activity. The project is delivered through a partnership between Creative Scotland, British Council Scotland, National Galleries Scotland, Architecture & Design Scotland, V&A Dundee, and the Scottish Government.

2.2.1.2 Creative Scotland

- As Scotland’s national government’s arts agency, in addition to Scotland + Venice and Momentum, Creative Scotland supports cultural exports in a variety of ways through funding infrastructure that supports artists to take their work beyond Scotland as evidenced in the following opportunities:
- **Made in Scotland:** This international showcase is in its 17th year and is partnered with the Edinburgh Festival Fringe to showcase a curated programme of Scottish theatre and dance to international promoters and audiences at the world’s largest international festival to secure international opportunities and the potential for touring onward from Scotland.



- **Made in Scotland Onward Touring Fund:** Since 2024, this touring fund has been delivered by the Edinburgh Festival Fringe society and supports onward international touring that has emerged from collaborations formed at the Edinburgh festival in August. The total budget of the fund is £100,000, with applicants eligible to apply for up to £15,000.
- **The Expanded Festivals Fund:** This aims to support Scottish festivals to expand their international reach and raise their international profile. Funding of up to £200,000 is available for applicants.
- **Music International Touring Fund:** This pilot fund created in 2026 by Creative Scotland and worth £300,000 was created to support the growing expense of international touring for musicians. The fund covers travel, freight and visa costs. It is operating on a one-year pilot scheme to determine the needs of the sector.
- **International Showcase:** Creative Scotland has supported sector representation at international

showcases including jazzahead!, SXSW, and Classical:NEXT over several years.

2.2.2 Business-specific-related organisations, agencies, and services

2.2.2.1 Scottish Development International

Scottish Development International (SDI) is the international trade and inward investment agency, jointly operated by Scottish Enterprise and the Scottish Government. Its cultural export role is indirect but strategically significant: it uses Scotland’s creative reputation as soft power to attract investment and open trade relationships. In practice, this means managing Scotland’s presence at major international trade events, running sector-specific trade missions, providing market intelligence for businesses looking to export, and deploying the Scotland brand in target markets. For the creative industries, SDI is most relevant to companies with commercial-scale games studios, screen production companies, and design businesses rather than individual artists or cultural organisations.

2.2.2.2 Scottish Enterprise

Scottish Enterprise is Scotland's national economic development agency, focused on business growth, innovation and export performance. Its relationship to cultural export sits primarily in the creative industries framing. It works with companies in screen, games, music tech, fashion and design that have the scale to be treated as growth businesses. Its tools include dedicated account management for high-potential companies, export readiness diagnostics, R&D investment, and connections into business networks and international markets. It does not fund artistic work directly; its entry point is the business behind the creative output. The practical gap in the ecosystem is that many cultural organisations and individual artists do not meet Scottish Enterprise's threshold for commercial intervention, leaving a significant middle ground between Creative Scotland's arts funding and Scottish Enterprise's business growth support.

2.2.2.3 UK Export Academy

The UK Export Academy is a Department for Business and Trade programme with a focus on export readiness. It delivers structured export training online modules, masterclasses and in-person events aimed at businesses that are new to exporting or looking to enter new markets. The content covers practical fundamentals: customs and compliance; market selection; pricing for export; intellectual property protection; and building international distribution channels. For creative sector businesses, it provides genuinely useful foundational skills, but the programme is sector-agnostic and does not address the specific complexities of the creative industries' touring visas, rights licensing, co-production agreements, or the economics of festival showcasing. Its value in this ecosystem is as a baseline skills layer, most useful for creative businesses at an early stage of internationalisation.

2.2.3 Sector-specific organisations, agencies, and networks

2.2.3.1 Craft Scotland

Craft Scotland is Scotland's national development agency for craft supported with funding from Creative Scotland. They support Scottish makers to present contemporary craft to both domestic and global audiences. A sector report on Craft Scotland 2023 identified the sector contributed £67.3 million to the economy. However, many craft makers faced challenges specifically in marketing and exhibiting their work in a post-Covid and post-Brexit landscape.

- Craft Hub is a three-year collaborative project, bringing together partners from across the UK and EU Ireland, Italy, Portugal, Germany, Greece, Norway and Denmark co-funded by Creative Europe. Craft Scotland is among the partner organisations contributing to the project. At its heart, Craft Hub sets out to demonstrate craft's enduring significance within Europe's shared cultural heritage, while exploring its vitality in contemporary creative practice. A key strand of the work involves researching and documenting craft skills and processes for a dedicated digital archive, alongside a broader investigation into how craft manifests differently across Europe, asking whether these differences reflect distinct cultural traditions or the individual motivations of makers themselves. The programme is ambitious in scale, supporting the creation of new work and experimental material investigations through 42 transnational maker residencies, 305 days of outreach activity, one festival, seven exhibitions and two conferences.
- HARVEST Contemporary Craft Fair 2026: Founded in 2025, this international contemporary craft fair based in Edinburgh aims to attract a global audience to Scottish craft. This year's fairs will consist of two showcase events that will run alongside Collect and London Craft Week.

2.2.3.2 Publishing Scotland

Established in 1975, Publishing Scotland is a well-established body in the literature scene, providing a network for trade and development for publishing in Scotland. They already have a dynamic amount of international activity and support happenings such as the following opportunities:

- **2025 Publishing Scotland Frankfurt Book Fair Bursary:** Up to five bursaries of £1,000 are available for publishing individuals or businesses to attend the world's biggest export market, The Frankfurt Book Fair, for selling rights as well as networking opportunities to represent Scotland's publishers.
- **Publishing Scotland Translation Fund:** This fund is issued by Publishing Scotland via a panel on behalf of Creative Scotland. It provides funding for international publishers to translate contemporary Scottish literature for the international market.
- **Author International Travel Fund:** Up to £1,000 is available for Scottish writers to go overseas to attend literary festivals or cultural exchange events, promote their work or present at fairs or conferences.
- **International Fellowship:** This fellowship aims to foster international collaboration between publishers outwith Scotland by inviting publishers to Scotland during the International Book Festival in August to network and create potential future collaborations.
- **Scottish Book Trade Conference 2026:** This is Scotland's largest book trade conference, which will attract publishers globally to Scotland.

2.2.3.3 Festivals Edinburgh

Festivals Edinburgh is a collective that was formed in 2007 from directors of Edinburgh festivals with the goal of maintaining and promoting Edinburgh as a festival city locally and globally through collaborative programmes and strategies. In their strategy 'Edinburgh City of Imagination: 2030 Vision for a Resilient and Ambitious Festival City', one of the priorities is to bolster 'global solidarity', especially in the light of Brexit and the pandemic. This priority circles back to the Edinburgh festival city's historic roots, which as the Edinburgh International Festival and Festival Fringe was born in a post-conflict context and reiterates the importance of festivals for peace building, international connections, community and freedom of expression. The ambition highlights the importance of Edinburgh's reputation as an international city destination in terms of economics, diplomacy, freedom, and creative collaboration and provides exposure for Scottish artists to global audiences to expand their career opportunities.

- **Cultural diplomacy programme and Momentum:** Edinburgh Festivals have a long-standing collaboration with British Council. The two organisations, along with Creative Scotland, Edinburgh City Council and Glasgow Life, convene to discuss the festival's role in soft power through their cultural diplomacy programme. Alongside this, Momentum runs during festival season in August with a bespoke programme for international arts industry professionals. In 2025, Momentum had 127 delegates from over 24 countries attend.
- **Enhancing digital capabilities:** Through this programme, there is increased investment into supporting festivals with digital delegate programmes that can reach new audiences as well as showcase the 'increasing exposure of British cultural output to international markets to facilitate trade and boost UK exports'.

2.2.3.4 Wide Days/Wide Events

Wide Events, a community interest company, plays an important role as a music export mechanism, in particular Wide Days founded in 2010, which is Scotland's two-day music conference that takes place in the capital each spring with a dynamic programme that provides opportunities for networking as well as showcasing opportunities with international delegates.

- **Talent Development Programme 2026:** With backing from PRS Foundation and Creative Scotland, four Scottish acts are chosen annually by a panel of local and international industry professionals to receive a year-round development package. This includes an artist grant, a showcase slot at Wide Days, professional video and photography, artist development sessions, bespoke mentoring, and meetings with international industry contacts.
- **International events:** Wide Events supports Scottish musicians to attend other international showcases, such as through partnerships with Scotland at FOCUS Wales, Scotland at The Great Escape, Scotland at SXSW and ESNS. As well as this, Wide Events supports an international audience on home soil through platforming Scottish artists at the Made in Scotland Gigs, which is in partnership with Wide Days and Edinburgh Festival Fringe Society and is part of the Made in Scotland showcase.

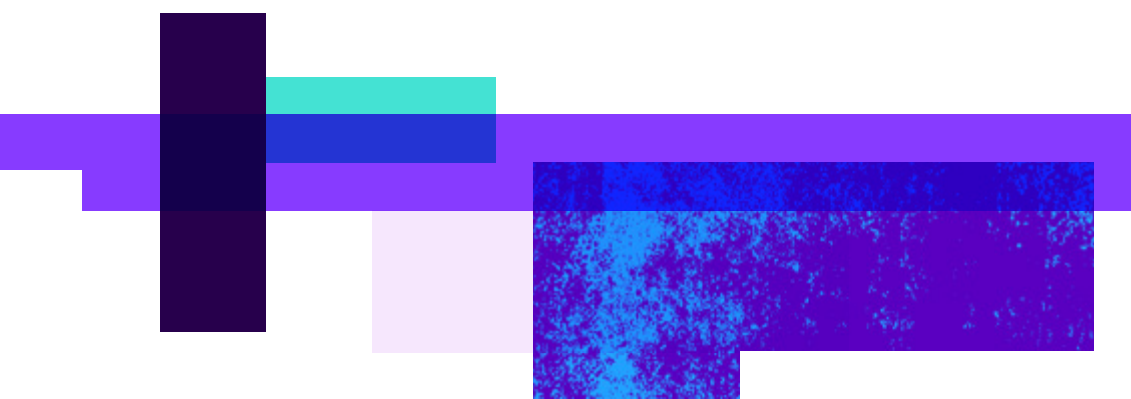
2.2.3.5 Imagine

Imagine is an arts organisation providing high-quality dance and theatre for children in Scotland and is best known for producing the Edinburgh International Children's Festival. Every summer, this festival attracts hundreds of delegates from around the world to Edinburgh to see shows including visibility for Scottish performances, creating an ideal environment for networking and a market for potential future touring opportunities. As well as the festival, Imagine has collaborated with European counterparts in projects like Shifting the Stage in collaboration with children's festivals in Norway, Sweden and Finland and supported by a Nordic fund to collaborate and share ideas on how best to support disabled-led work for young audiences. In terms of cultural exports, this is an example of how Imagine exports not only ideas but approaches to creating work and knowledge exchange about best practice in the areas of rights-based practice and disabled-led work as well as sustainability practices. Overall, they represent a form of cultural exchange that values human connection and prioritises relationship building and the potentiality of future collaborations supporting emerging artists and labs and development works with international partners.

2.2.3.6 Independent music export practitioners

Alongside the organisations profiled above, a small number of independent practitioners have, over many years, carried out much of the practical work of connecting Scottish music with international markets, and are widely regarded within the sector as authorities on how cultural export actually functions in practice.

Lisa Whytock has led on folk, roots, world and traditional music export for over two decades. She helped establish Showcase Scotland Expo in 2012, extending Celtic Connections' international programme beyond its previous one-month showcase window. An independent evaluation of the initiative found a return of £349 for every £1 of Creative Scotland investment in terms of international fees, merchandising sales and publishing income for artists. During the pandemic, she developed Global Music Match with Sounds Australia, a peer-to-peer artist collaboration model that produced ongoing international partnerships. She has also given evidence to the Scottish Parliament's culture committee on the case for a dedicated onward touring fund for music, an area in which theatre already has provision but music currently has none.



Olaf Furniss co-founded Wide Days, Scotland's principal music industry convention, in 2010, and previously worked as a pan-European music industry journalist with close ties to the French, Norwegian, Finnish and Icelandic music export offices. His work has focused on widening the definition of music export beyond live performance and touring, including sync-licensing readiness training, artist preparation programmes such as Make It Count, and partnerships with international showcase events including Eurosonic, M for Montreal and Waves Vienna.

Michael Lambert co-runs Wide Events alongside Olaf Furniss, manages a roster of artists, and runs the music marketing agency Aimless Play. His work has centred on artist and industry education, market intelligence, and a talent-development pipeline connecting emerging Scottish artists to international opportunity, including the Off the Record programme for 16- to 25-year-olds, which has supported several artists and managers who have gone on to international touring careers.

Across their different specialisms, all three independently identified the same underlying gaps: funding routes for international opportunity that are fragmented, competitive, and too slow to match the pace at which showcase and touring offers are made; and a persistent focus on supporting individual artists rather than the wider industry of managers, labels, publishers and booking agents on which a sustainable export ecosystem depends. Their work illustrates, in concrete terms, a theme that recurs throughout this report: the relational infrastructure currently underpinning Scotland's international cultural activity is expert, committed and delivering results, but it remains informally organised and dependent on the sustained goodwill of a small number of individuals.

2.3 Section summary: Considering a Scottish Cultural Export Service

In the absence of an established cultural export service specific to Scotland, cultural export has taken a patchworked approach consisting of individual actors and funding programmes working in a segmented, largely sector-specific manner. In response to government interest in formalising a Scottish cultural export service, this research has been conducted to explore the demand for such a service across the broad landscape of Scotland's cultural sector and what form that might take. Where this section has utilised desk research to provide policy context and outline Scotland's existing cultural export ecosystem, the following section reflects sector experiences of cultural export.





Evidence from stakeholder engagement

Evidence from stakeholder engagement

3.1 Reminder of engagement approach

In order to document how cultural export is understood and experienced within Scotland's cultural sector, three distinct approaches were utilised to encapsulate the breadth of cultural export activity that exists within the sector and ensure thorough representation of the cultural sector itself. In addition to a comprehensive sector-wide survey, industry-specific discussion groups with senior leaders were conducted to emphasise distinct areas of focus within industry-specific cultural export activities. Interviews with individual industry leaders were also conducted to supplement these consultation groups, with a primary focus of speaking with leaders from industries under-represented within the sector survey.

The survey itself was based on a series of questions developed in association with the British Council, with a mix of selection and open-text options. The 124 survey respondents were, on average, incredibly generous with their responses.

3.2 Findings from the sector survey

3.2.1 Respondent profile

The survey captured the views of 64 individual practitioners and 60 organisations involved in the arts and cultural sector in Scotland. Of the organisations, 83 per cent of responses were on behalf of a micro (35 per cent) or small (48 per cent) organisation, with medium-sized organisations making up 10 per cent of organisational responses. The remaining organisation responses were either from large organisations (2 per cent) or uncategorised (5 per cent).

3.2.1.1 Respondent location

With 22 of Scotland's local authorities represented within survey respondents, most respondents were located within the Central Belt, with Edinburgh and Glasgow making up the majority. No survey responses were received from the following local authority areas:

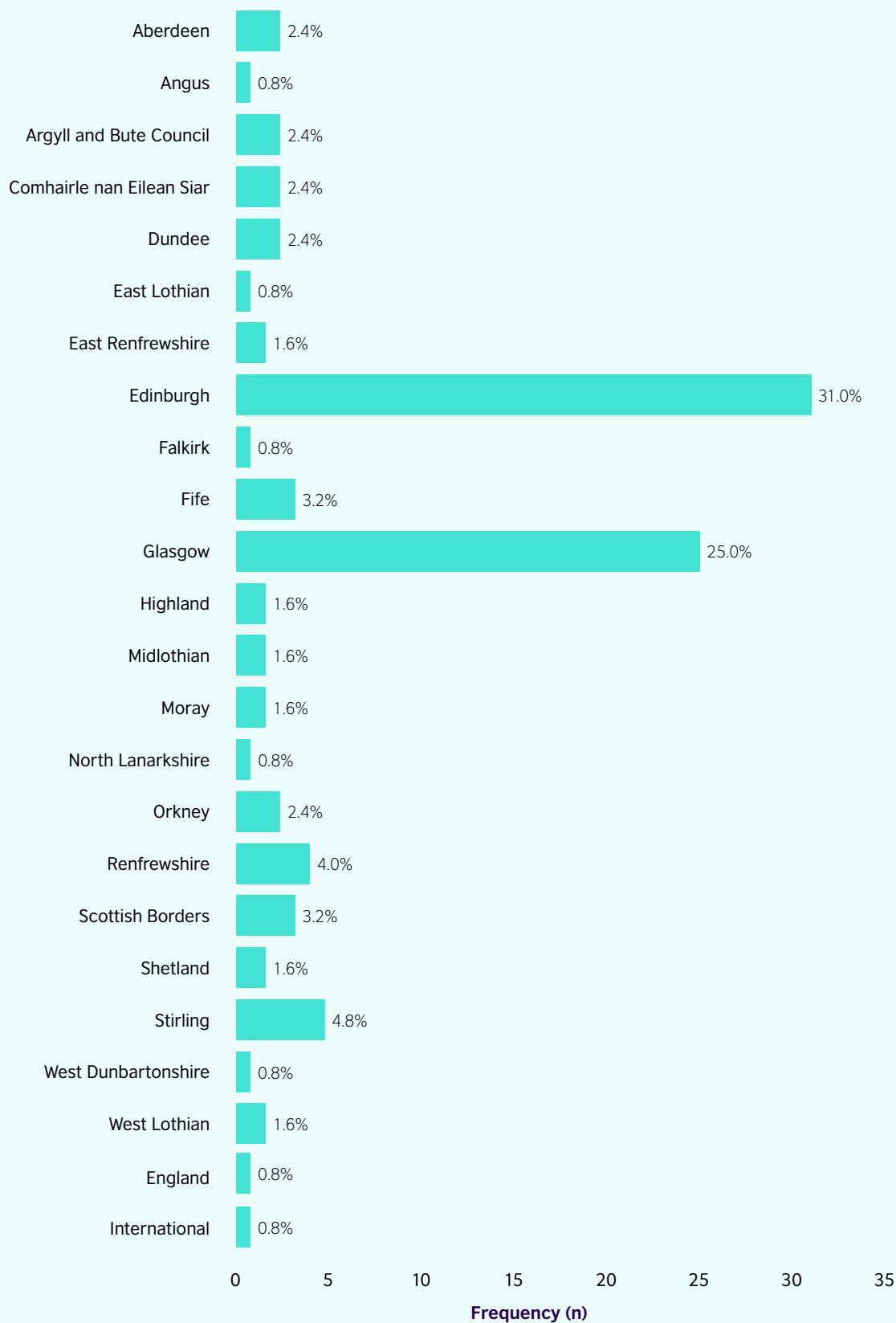
- Aberdeenshire
- Clackmannanshire
- Dumfries & Galloway
- East Ayrshire
- East Dumbartonshire
- Inverclyde
- North Ayrshire
- Perth and Kinross
- South Ayrshire
- South Lanarkshire.

There were additionally no responses from individuals or organisations based in Wales or Northern Ireland. This distribution highlights both the reach of the survey and the geographic areas where further engagement may be beneficial. The table below indicates where respondents were located.

Location	Organisation	Individual	Total
Aberdeen	5%	0%	2.4%
Angus	0%	2%	0.8%
Argyll and Bute Council	0%	5%	2.4%
Comhairle nan Eilean Siar	2%	3%	2.4%
Dundee	2%	3%	2.4%
East Lothian	0%	2%	0.8%
East Renfrewshire	0%	3%	1.6%
Edinburgh	40%	23%	31%
Falkirk	0%	2%	0.8%
Fife	2%	5%	3.2%
Glasgow	32%	19%	25%
Highland	2%	2%	1.6%
Midlothian	2%	2%	1.6%
Moray	3%	0%	1.6%
North Lanarkshire	0%	2%	0.8%
Orkney	0%	5%	2.4%
Renfrewshire	2%	6%	4%
Scottish Borders	2%	5%	3.2%
Shetland	3%	0%	1.6%
Stirling	3%	6%	4.8%
West Dunbartonshire	0%	2%	0.8%
West Lothian	0%	3%	1.6%
England	0%	2%	0.8%
International	2%	2%	0.8%

Table 1. Responses to survey question: Where are you/your organisation primarily based?

Responses to Survey Question “Where are you/your organisation primarily based?”



3.2.1.2 Cultural Sectors Reflected in Survey Responses

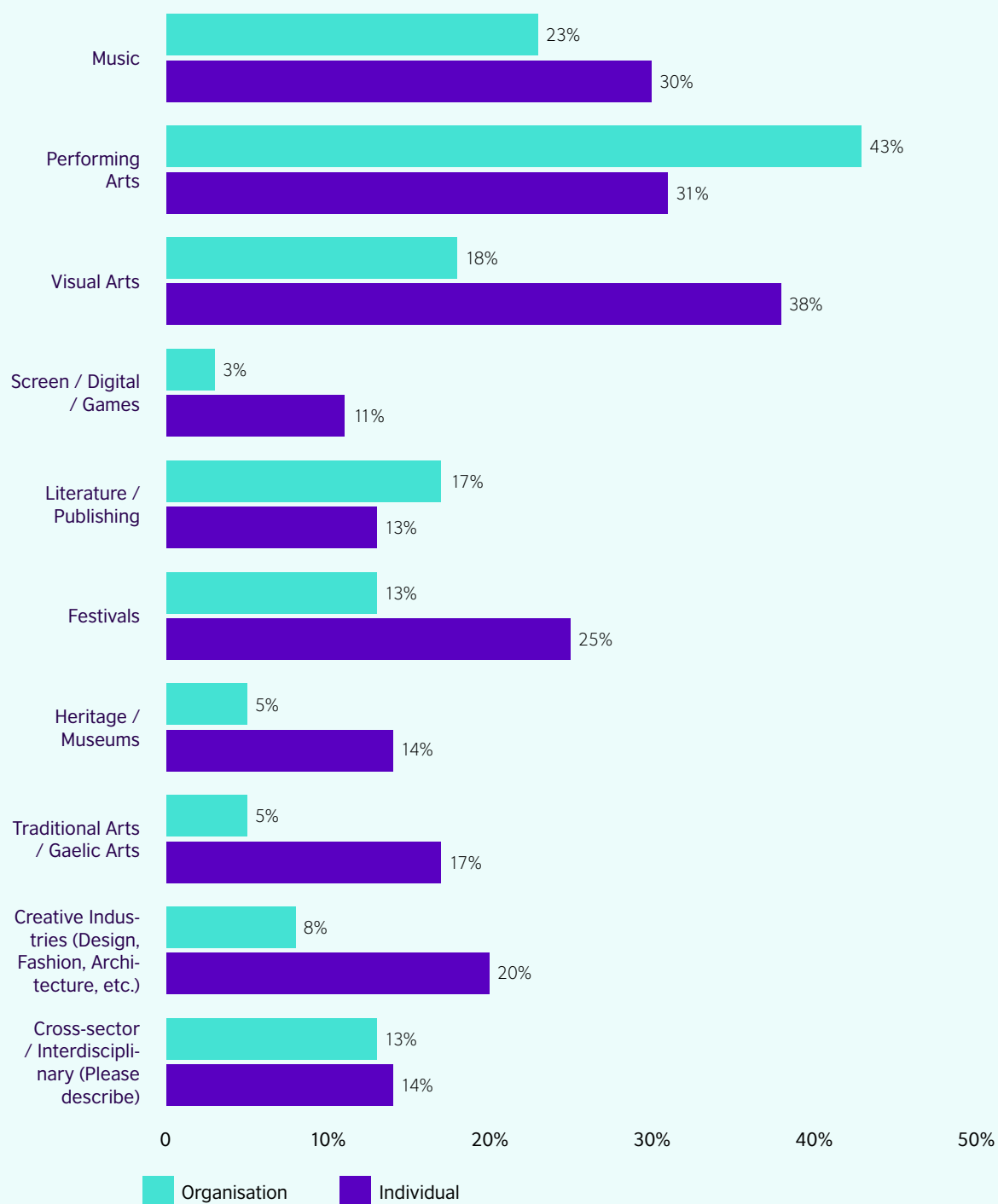
The survey encouraged responses from individuals and organisations that identified as working within the cultural sector and had either experience or interest in engaging with cultural export. The survey offered a selection of sector categories to choose from in line with guidance from the British Council, with an option for respondents to self-describe their sector practice. The table below summarises their responses:

Sector	Organisation	Individual	Total
Music	23%	30%	27%
Performing arts	43%	31%	37%
Visual arts	18%	38%	28%
Screen/digital/games	3%	11%	7%
Literature/publishing	17%	13%	15%
Festivals	13%	25%	19%
Heritage/museums	5%	14%	10%
Traditional arts Gaelic arts	5%	17%	11%
Creative industries (design, fashion, architecture, etc.)	8%	20%	15%
Cross-sector/interdisciplinary (please describe)	13%	14%	16%

Table 2: Responses to survey question: Which sector(s) do you primarily work in?



Survey Responses to question Which sector(s) Do You Primarily Work In?



Twenty respondents included descriptions of their cross-sector/interdisciplinary responses. These are listed below, with some responses edited to maintain anonymity:

- Film, digital.
- Digital storytelling, community archives, cultural heritage, and technology-led platforms.
- Multi-arts.
- Diplomacy.
- Contemporary craft.
- Culture, tourism, education.
- Trade and investment.
- Climate/biodiversity/energy.
- Community-led work for theatre/dance/choir.
- Theatre music dance installation.
- Artist support, multidisciplinary arts projects.
- Film, animation, literature.
- Comedic arts including stand up, clowning, sketch and improv.
- Publishing, podcasting, storytelling, and heritage.
- Comic books.
- Socially engaged practice.
- Live art.
- Music, visual art, performance, curation, festivals, etc.
- Outdoor arts.
- Urban planning and community/participatory arts.
- Community-based culture.
- CreaTech, performing arts, screen, dance, film, music composition, theatre.

Of note within the overall responses is that most individual practitioners or organisations do not operate within a singular sector: outwith respondents who indicated they worked within a cross-sector or interdisciplinary capacity, the majority of respondents indicated more than one sector within their selection. **This offers a useful insight when considering the sector-specific nature of many of the survey responses, as well as discussion within sector-specific consultation groups and interviews.**

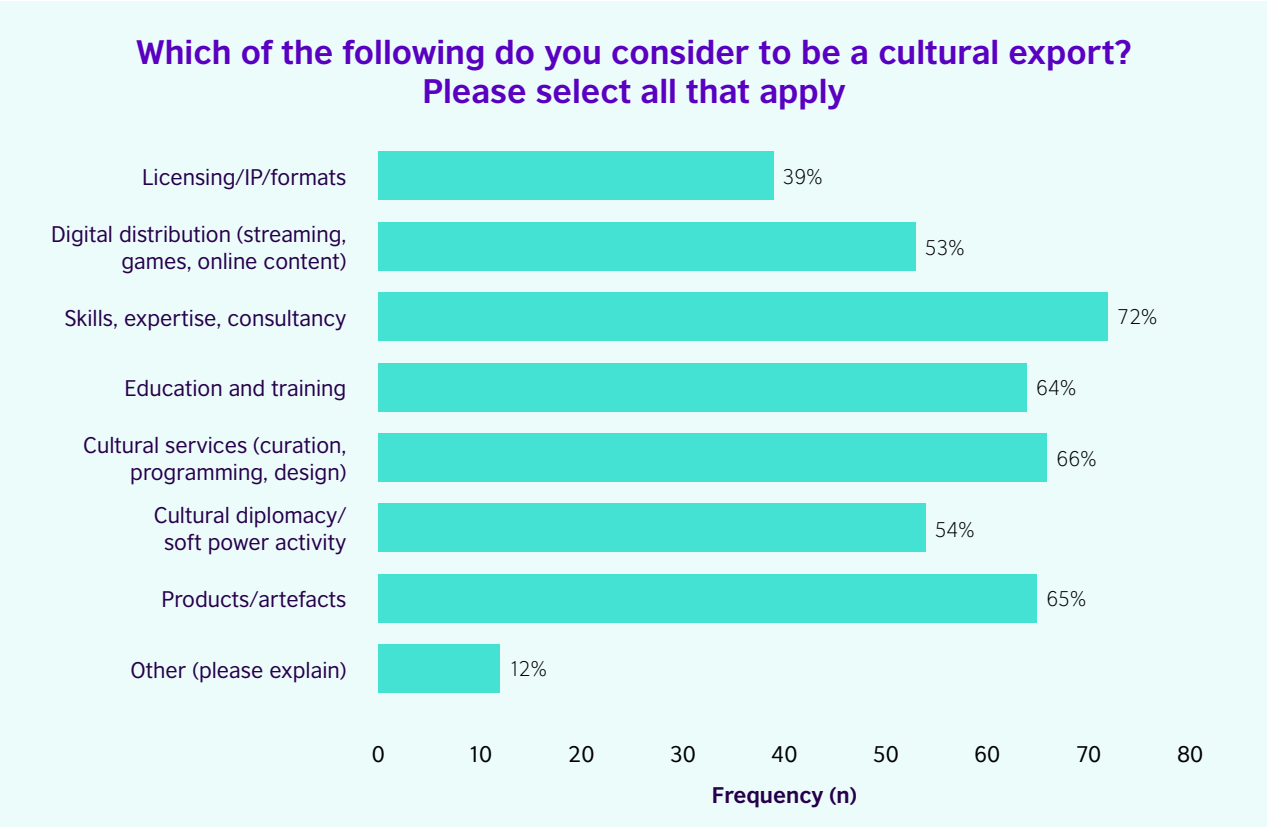


3.2.1.3 Understandings of cultural export reflected in survey responses

While survey respondents were offered a broad definition of cultural export at the start of the survey, a useful aspect of the survey was documenting how cultural exports are understood by the cultural sector in general and by each sector in particular. More detail on sector-specific understandings of cultural export is provided within the next subsection as related to key themes identified within survey responses. Meanwhile, the table below reflects the broader categorisations of cultural export activity within the sector:

	Total
Licensing/IP/formats	39%
Digital distribution (streaming, games, online content)	53%
Skills, expertise, consultancy	72%
Education and training	64%
Cultural services (curation, programming, design)	66%
Cultural diplomacy/soft power activity	54%
Products/artefacts	65%
Other (please explain)	12%

Table 3. Which of the following do you consider to be a cultural export? Please select all that apply



‘Other’ responses include the following, with some edited for brevity and anonymity:

- Intangible cultural heritage practices, new music.
- Community-led digital archives and diaspora storytelling platforms.
- Residencies.
- Cultural collaboration and creation.
- Shows (products?).
- Collaboration; academic.
- Touring of groups.
- Performances touring internationally.
- Gigging overseas.
- Theatrical performance.
- Performing arts opportunities.
- Ideas, leadership models, models of access, methods of working.
- Theatre pieces.
- International exchange projects and research/development projects.
- Reciprocity.

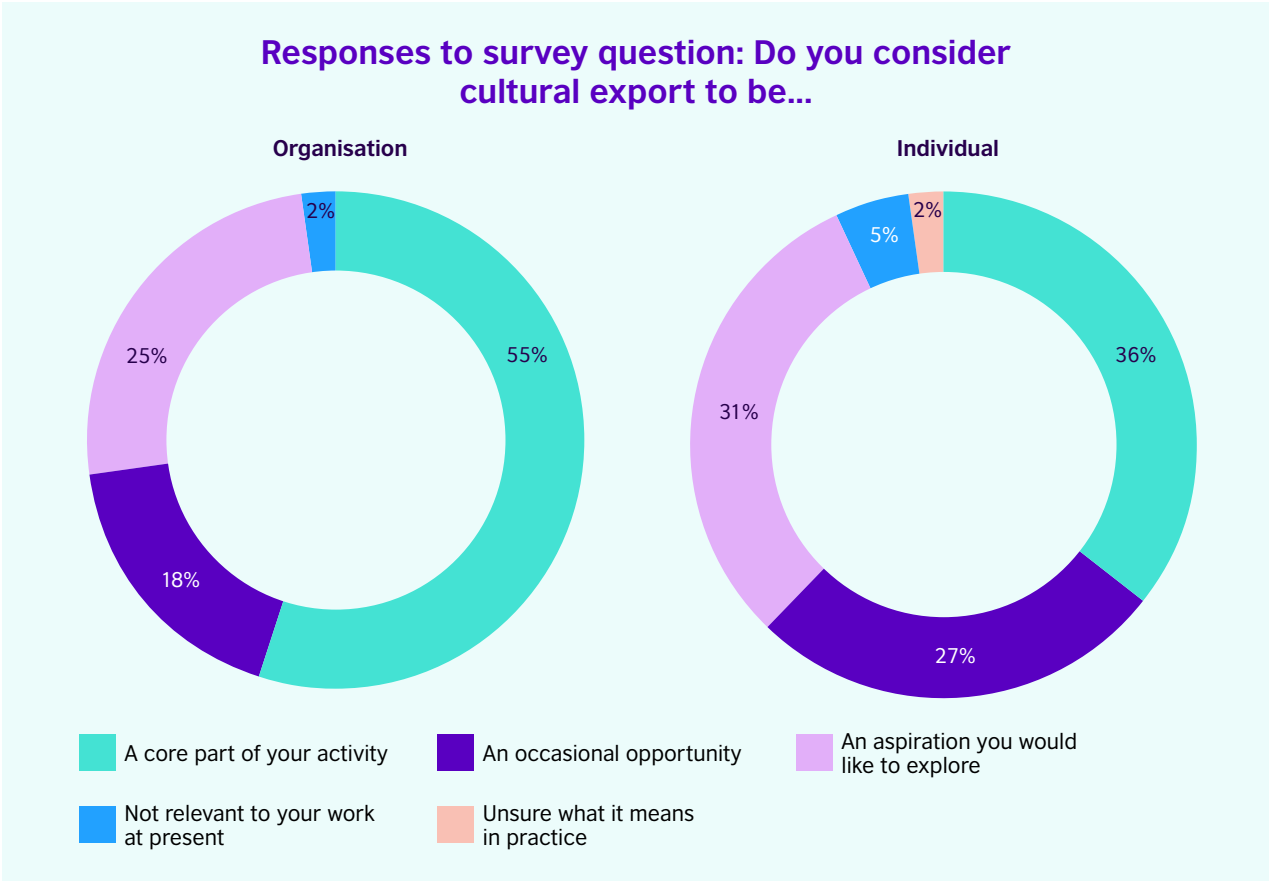
While the cultural export categories lacked clarity for how live or performing arts might be categorised, notably in the above response of ‘*Shows (products?)*’, these responses can also be interpreted as a reluctance to categorise cultural work within terms linked to economic activities. One survey respondent offered that the term ‘cultural export’ is itself ‘*slightly colonial in nature*’, clarifying that ‘*putting an economic slant on art is, again, a colonial way of understanding art*’. This is a theme that recurs within the discussion of key themes from the survey in Section 3.2.2.

3.2.1.4 Engagement with international work reflected in survey responses

It is perhaps unsurprising that of those who chose to respond to the survey, very few felt that it was not relevant to them or were unsure of the term. The majority of survey respondents engage with cultural exports as either a core part of their or their organisation’s activities or an occasional opportunity, as reflected in the table below:

	Organisation	Individual	Total
A core part of your activity	55%	36%	45%
An occasional opportunity	18%	27%	22.5%
An aspiration you would like to explore	25%	31%	25.8%
Not relevant to your work at present	2%	5%	3.2%
Unsure what it means in practice	0%	2%	0.8%

Table 4. Responses to survey question: Do you consider cultural export to be...

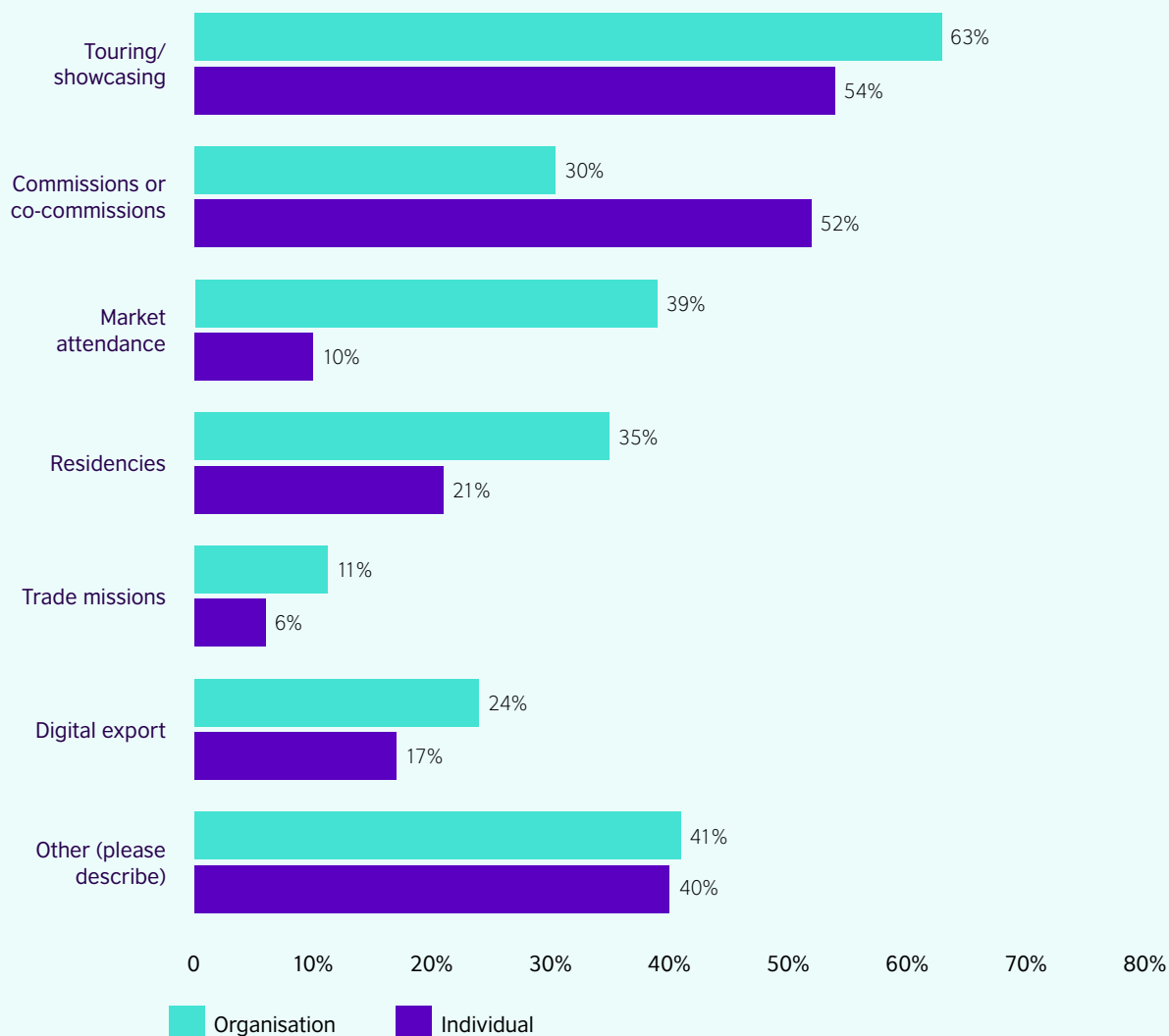


Of the 124 survey respondents who filled in the survey, 106 had engaged with international work within the past five years.

Activity	Organisation	Individual	Total
Touring/showcasing	63%	54%	58.5%
Commissions or co-commissions	30%	52%	40.5%
Market attendance	39%	10%	24.5%
Residencies	35%	21%	28.3%
Trade missions	11%	6%	8.5%
Digital export	24%	17%	20.7%
Other (please describe)	41%	40%	40.5%

Table 5. Responses to survey question: What forms have your/your organisation's [international] activities taken?

Survey Responses to question Which sector(s) Do You Primarily Work In?



For those who responded 'Other', many included detailed responses of international activities, which have been summarised and categorised below for ease of reading and to maintain respondent anonymity. The dominance of the 'Other' category within these responses indicates a very broad range of activities that were perhaps difficult to neatly categorise or not perceived as in alignment with the existing offered categories.

Organisation 'Other' responses:

- Exhibitions, programming (4)
- Education and training workshops (4)
- Digital and live events (5)
- Sale of physical goods (3)
- Research and development (2)
- Networking
- Invited guest.

Individual 'Other' responses:

- Knowledge and/or cultural exchange programmes (5)
- Sales (5)
- Presentations (3)
- Invited guest
- Exhibitions (2)
- Festival
- Delegate team
- General engagement/activations
- Webinars and virtual events (2)
- Private performances
- Design services
- Collaboration (online and in person) (2)
- Commission.



3.2.2 Key themes

3.2.2.1 Export and exchange: understandings of cultural export

Scotland has rich current cultural practices and history, both intangible and tangible, which could be packaged into cultural exports such as in international cultural collaboration, formation of new works to be sold or toured and best practice from Scotland could become centres for excellence with offers in export like educational specialists, instruments or products, works, experiences and intangible heritage products or practices.

Cultural export is not only about objects or finished garments. It is about sharing skills, values, and ways of making – including repair, reuse, and sustainable textile practice – that reflect Scotland's cultural and environmental heritage.

Imagining exports from architecture would include promoting architectural practices based in Scotland, to help gain recognition, new contacts and new work in new markets.

When it comes to describing the activities involved in or defining cultural exports, the breadth and diversity of activity across the sector means there is no singular definition or approach that encapsulates cultural export activity in a simple, cohesive manner. In reviewing the activities detailed by survey respondents, the top three thematic categories of cultural export activities include:

- Work being presented or completed abroad by artists/creatives/producers (includes tours, exhibitions, screenings, etc.).
- Engagement in knowledge and skill building and/or sharing.
- Sale of physical and/or digital creative/cultural product, experience, service, publishing/licensing rights.

Other activities include:

- Cultural collaboration or exchange.
- International promotion of Scottish products, practices, and heritage.
- Relationship/audience building from personal to national level.
- Facilitating opportunities for others to work internationally.

In-person activities were observed to be the default for international work, but digital or online activities appeared more standardised or commonplace for those navigating sales, licensing, and rights related to products or outputs that could be presented in a digital format such as audio or graphics.

In the book world, [cultural export] could be sales of Scottish books overseas, whether physical (shipped overseas) or digital (ebooks/audiobooks). It could also be sales of publishing rights for particular languages or territories for individual books, e.g. selling German rights on a children's novel, or selling Australian (English language) rights on a textbook.

A notable point of tension within the categorisation of cultural export activities is the hesitancy around the use of the term 'cultural export' itself. Predominantly observed in responses by individual practitioners who do not engage in explicit sales, there was a reoccurring questioning of and occasional pushback against 'export' as a term; the preferred alternative phrase largely being 'cultural exchange'. This pattern was observed across multiple art forms rather than being concentrated in one or two, though it was most frequently raised by practitioners working outside explicitly commercial or sales-based models.

For me, it's about more than just sending musicians abroad to perform. It includes touring, yes, but also collaborations and educational work that allow our music, traditions, and cultural identity to travel and connect with people in other countries.

[Cultural export] includes exhibitions touring abroad, digital works reaching international audiences, collaborations with global institutions, and ideas that influence discourse beyond the UK. At its best, cultural export builds soft power, economic value and cross-cultural dialogue without diluting the politics, memory or identity embedded in the work.

3.2.2.2 Current barriers and gaps to cultural export

A Scottish Cultural Export Service could provide a central, specialist function that does not currently exist in a coherent way. At present, support for international activity is spread across multiple bodies and programmes, with no obvious single point of access for managers, artists, and creative businesses.

There is also often a lack of clarity about where to start. Information about funding, touring support, visas, and international partnerships can be spread across different organisations and programmes, making it difficult for smaller organisations to navigate. This can lead to duplication of information in some areas, while practical guidance for first-time exporters remains limited.

The majority of identified barriers to engaging in cultural export and gaps in current cultural export offerings relate to an absence of a clear, joined-up ecosystem. Respondents emphasised that because of the lack of cohesive structure with clear entry points for engagement, any support that might exist for learning about or engaging with cultural export is difficult to both access and navigate. The current system in Scotland was described as largely relying on informally shared knowledge about which individuals or organisational entities should be contacted for specific advice or assistance with cultural export activity. As a result, networking within and across the industry is seen as vital for personal and professional success for engaging with cultural export. However, such relationship building was described as requiring a significant investment of both time and money, presenting a barrier to engagement for less-resourced individuals and entities such as emerging practitioners, and micro-organisations, and small organisations.

Freelancers and micro-organisations do not have the tools, finances, or time to invest in researching the ever-changing international regulations.

From a grassroots perspective, one of the main gaps in the export support landscape is the lack of clear, accessible pathways for smaller and artist-led organisations to engage internationally. Much of the existing support appears geared towards larger institutions, commercially established artists, or organisations that already have international networks and administrative capacity.

I don't even know where to start and scared that I'll get it wrong and suffer financially and legally.

I can't afford the time to take a week away if it is not going to have some form of financial return and I couldn't justify it to the publishing companies and authors I work for either.

Within the existing structures or resources for cultural export support, several barriers to engagement and gaps of support were identified by survey respondents. First, respondents reported a lack support for identifying and pursuing international opportunities. Namely, respondents described a need for support regarding how to navigate sector-specific networks on a national and international level, and how to locate opportunities for international work. Again, the importance of 'who you know' was stressed within this particular barrier, with emerging practitioners and micro-organisations in particular commenting on the difficulties with finding and pursuing networking opportunities in general and identifying important or useful ones.

I would like to tour in Europe and beyond as well as make connections to increase opportunities to write, produce, and collaborate with other art forms. As an independent artist with no management or connections, I have no idea where to begin to make this happen. It feels like gatekept knowledge.

As a small Scottish business, it would be fantastic to be able to access Scotland-specific information about how best to export to and engage with communities in different countries. I think the demystification of international exports would also be very beneficial.

A second key barrier is the need for administrative and advisory support regarding the legal and business considerations of international work. This was largely attributed to the uncertainty of navigating work in the EU post Brexit, with concerns related to visa administration and shipping tariffs. A need for tailored, sector-specific support was emphasised, with respondents who did not identify as engaging with commercial activities framing the existing support as centred on business and larger organisations as opposed to individual practitioners or small entities.

There appears to be a gap between general music sector support and dedicated, clearly defined export development support. While a number of organisations touch on international activity, export does not always appear as a central, consistently resourced function. This can make it difficult to identify who holds responsibility for specific territories, market development, or international relationship building.

Culture Ireland, Performing Arts Netherlands, Catalan Government, Department of Culture for Flanders, PISA (Spain) and many other European countries offer their artists support to tour internationally, when they are programmed by Festivals. This often means Scottish works are not picked up because a cheaper option is available of a similar quality.

Third, Scotland's funding structure and financial support for cultural export are framed as both inaccessible and insufficient for maintaining a competitive edge within international working. One aspect of this is the funding support for pursuing international opportunities, which was described as being misaligned or out of sync with many of the timescales of international opportunities. Respondents commented that emerging opportunities that require fast action to take advantage of are often hindered by the lengthy funding applications as well as long turnaround times for funding

decisions. Additionally, the time required to locate and apply for funding was framed as a barrier for individuals and smaller entities.

Funding options for supporting international work from Scotland was perceived to be limited or non-existent: some participants reported that the current funding options via Creative Scotland meant they had to choose between national projects, personal development and research, or international opportunities such as festival appearances or tours, as multiple applications are reportedly not allowed. Scotland's cultural funding infrastructure as a whole was often negatively compared with other European cultural funding bodies. Some respondents experienced with engaging with or facilitating cultural export activities noted that the UK in general and Scotland in particular is developing a reputation for being less supportive of live works and exhibitions going abroad, indicating that Scottish acts are beginning to be seen as too much of a financial and administrative risk to engage with for festivals and events compared to those from other countries.

3.2.2.3 Perceived usefulness of a Scottish Cultural Export Service

A Scottish Cultural Export Service could be useful because the current support landscape can feel fragmented and difficult to navigate. While organisations such as Creative Scotland and partners including the British Council provide important routes into international markets, there is no single, clearly identifiable gateway that brings together advice, funding, market intelligence and long-term strategy specifically focused on export. A dedicated service could provide clarity, co-ordination and a more coherent pathway for artists and companies at different stages of international development.

When asked how a dedicated cultural export service in Scotland might be useful, respondents largely raised the importance of centralised resources and dedicated funding to ensure the culture sector's continued engagement and development within international work. Specifically, the centralisation of general support, resources, and advocacy were seen as a way to make cultural export more accessible for the sector as a whole by establishing clear access pathways to international networks, leading to increased opportunity for international work, partnerships, and audience building. Respondents also envisioned such a service would indicate increased dedicated funding for cultural export along with funding guidance for funding opportunities within and outwith Scotland. Finally, a cultural export service was framed as being useful due to the expected centralisation of knowledge and support with regards to developing work for international audiences and customers as well as administrative guidance.

Clearer export pathways would allow our work to move from informal international engagement to more sustainable, strategic, and impactful global activity.

Increased funding would allow our work to be more reciprocal.

A Scottish Cultural Export Service would be useful in providing clarity, co-ordination, and confidence for organisations seeking to work internationally.

A single point of advice, funding, networking and proactive promotion would be invaluable. Feels very disjointed currently.

It is worth noting that, of the 124 survey respondents, three were explicitly opposed to the creation of a dedicated cultural export service in Scotland. All three raised concerns about the incompatibility between the Scottish Government's climate and sustainability priorities and the environmental impacts of international travel and tourism. This tension was reflected on within many other survey responses, but others hoped the establishment of a service might help with more sustainable cultural export activities.

We haven't an ethical framework in place to understand the social and environmental impacts of our work as a whole – and there are no interconnected discussions on things like Venice Biennale, etc. It is just accepted as good.



3.2.2.4 Lessons from existing cultural export models or services

Many respondents who have engaged in international work offered insights as to best practices based on existing cultural export services and organisations that they had personally collaborated with or had been told about from others. However, while some made explicit links to particular international entities, some referred to services and qualities unattributed to specific countries or organisations.

Three key aspects were highlighted as key to a successful cultural export service in Scotland that are demonstrated in other countries: first is the prioritisation of long-term relationship building with both audiences and collaborators. Respondents noted that even in countries with formalised cultural export services, informal relationships and networks are key for facilitating international working, in particular reciprocal, collaborative works. It was observed that other countries acknowledge the

value in funding international travel for both formal delegations and informal knowledge gathering and network building. As demonstrated within the selected quotes, Ireland was a popular comparator alongside Australia.

We are aware of informal models of cultural export that take place through festivals, artist residencies, and peer-to-peer collaborations between collectives in different countries. For many grassroots organisations, these informal networks often function as the primary way international exchange happens.

Culture Ireland and the forthcoming Australian Performing Arts Market bring Department of Trade to the event who witness the shows, generating interest and will potentially earmark funding if touring opportunities present. They are 'in' early.

The Australians have a very clear funded model bringing high-profile international publishers into Sydney Writers Week and sending their publishers on trade missions to New York with meetings set up and receptions arranged.

A second lesson offered by respondents is to ensure that support structures are adaptable in order to optimise inclusivity of practices, art forms, and demographics. This was motivated by two primary concerns: (1) keeping the work of cultural practitioners and organisations central to the organisation, and (2) keeping engagement with the hypothetical service itself accessible to practitioners and organisations of all professional stages. While not explicitly stated, there was inferred concern that a cultural export service might, with time, prioritise more commercial outputs, larger organisations, and more established artists. This lesson in particular was not linked to a specific existing service and might therefore be taken as an indication of perceived rather than experienced best practice.

Successful organisations regularly review outcomes, acknowledge when initiatives have not delivered, and adjust strategy accordingly. Transparent communication about what worked, what did not, and why helps the sector learn and builds trust.

A Scottish Cultural Export Service could best support underrepresented groups by designing support that is accessible, flexible, and reflective of how people actually work. This includes clear guidance, tailored capacity building, and proactive outreach to freelancers, micro-organisations, and community-led initiatives. Support should recognise digital and hybrid forms of cultural practice, reduce administrative barriers, and provide early-stage pathways into international work.

Third and finally, survey respondents suggested that a Scottish cultural export system should maintain a clear provision of practical guidance and support for export logistics. Establishing the service as a 'one-stop shop' was seen as a best practice in line with cultural export services in other countries, and key to the normalisation of international working.

One key lesson from existing cultural export models is the importance of having a clearly signposted, central point of access where artists and organisations can easily find guidance, funding opportunities and practical resources. Many successful export services internationally act as both an information hub and a connector, helping cultural practitioners navigate international work while also facilitating introductions to partners, festivals and networks abroad.

Success would mean a clear, trusted, and well-co-ordinated cultural export ecosystem that supports sustained international engagement across Scotland's cultural sector.

3.3 Findings from consultation groups

3.3.1 Respondent profile

Discussions were held with 15 consultation groups, each with four to six people in attendance representing senior leadership within the cultural sector. Two initial advisory group discussions were held with mixed-sector representation: the first with representation from the games sector, performing

arts, heritage, creative industries, visual arts, and cultural policy; the second with representation from the music sector, theatre, academia, and creative industries. Sector-specific meetings were subsequently held with craft, design, and architecture; craft; creative industries; dance and theatre (2); literature (3); music (2); producers; trad arts; and visual arts, each lasting between an hour and an hour and a half.

3.3.2 Key themes

3.3.2.1 Brexit and Covid have made a mess of things

Everyone was saying, we miss Scotland, when are you coming back?

(visual arts)

Across all consultation groups, the impacts of Brexit and Covid were repeatedly referenced. Covid was largely framed as a reset button of sorts, its economic impact resulting in the collapse of many social and professional cultural export networks due to the permanent closure of numerous cultural institutions, services, and organisations across the globe.

Participants frequently referred to services and projects that had been in development prior to Covid that might have been key supports for further cultural export activities, and in their absence an internationally co-ordinated effort was required to rebuild these lost supports and connections. Additionally, the standstill with international work during lockdown and its gradual return post lockdown has reportedly resulted in an experience gap for pursuing international opportunities.

With Brexit, participants referred to the complexity of trying to engage with a familiar social and professional infrastructure with a new set of logistical rules and regulations such as tariffs and visas. This has resulted in further isolation from projects, programmes, and networks that participants had been engaged with prior to Brexit, as well as significant anxiety about engaging with international work. Participants raised that Brexit has generated an assumption that cultural export is no longer possible, meaning many emerging or up-and-coming practitioners do not consider international work as a viable opportunity.

I think what we've really seen since Brexit and Covid is the amount of medium-sized bands across all different genres of music massively decline in terms of their ability to access international showcase opportunities. And because of there not being a dedicated export kind of mechanism of support to allow that to happen, the opportunities that generally do come are one-off showcases at different festivals across the world. But there's not the ability for artists to then, you know, invest further into that market, turn that into a sustainable international career.

(music)

3.3.2.2 Contradiction within current infrastructure

There's a lot of stuff that happens in export in Scotland just now, but it's all quite fragmented.

(music)

Consultation group participants raised that in the absence of a clear cultural export structure in Scotland, a great deal of organisations and individuals were working to make up the gaps in the general cultural export ecosystem on their own. This was repeatedly described as occurring in a disjointed fashion and largely reliant on networked connections, in line with observations from survey

respondents. As such, while there is no official cultural export system, a constellation of systems has been created over the decades largely contained within specific sectors.

Funding from Creative Scotland plays an important role in pursuing international opportunities, but without specialised export focus it was reported as being incompatible with many cultural export pursuits. The Creative Scotland Open Fund was raised as an example of a funding opportunity that could facilitate international work, but this was often not viable due to funding response timelines. In looking to broader UK funding schemes, participants noted that existing UK cultural export and general cultural funding schemes do not proportionately benefit Scottish organisations and practitioners.

Finally, participants noted that within the current cultural export infrastructure there is a lack of clarity on how to balance sustainability goals with international collaboration interests, in particular as related to travel-based opportunities such as touring, showcase attendance, and delegations. Where some participants framed this as an oddity or casual point of observation, others indicated it as a source of anxiety for themselves and/or the practitioners they work with.

The UK is basically London.

(creative industries)

3.3.2.3 Imbalances in domestic development

I think the creative industry sector needs an overhaul in terms of what's currently on offer to young people. It's so outdated given the landscape has changed so, so much.

(creative industries)

There needs to be a good, consolidated strategy around the talent pipeline that's coming through, and with the evolution of new technologies, that talent pipeline is coming through quite quickly, but predominantly on social media. But we know the power of social media and what that does in terms of propelling people across the world beyond borders.

(creative industries)

Participants offered that there's demand to support a wider variety of creative and cultural practitioners across the broader sector, but that more of a domestic market would need to be built in order to generate opportunities to feed upcoming talent into. References were made to the impact of poor economic investment in young people, Brexit, and Covid on the talent pipeline, resulting in key talent shortages such as a low number of experienced producers to facilitate international work. A participant from the music sector suggested this was a 'chicken and egg' dilemma, wherein increased focus on building domestic talent would ultimately result in more cultural export, and focusing on export would help build domestic talent. A key aspect of this for Scotland across the cultural sector was the creation of sustainable careers for people without requiring them to relocate to London, meaning cultural talent would be retained within Scotland and financially supported through cultural export.

That being said, participants acknowledged that engaging with cultural export is significantly more difficult for individuals, micro, small, and medium-sized companies. All consultation groups referred to a particular organisation or established practitioner within their sectors who reportedly made up the majority of the sector's international activities, or even economic activities. These groups and

individuals were seen as receiving the most international attention but also experiencing the least amount of risk due to commercial success or comparatively high levels of public funding. It was posited that less established practitioners and organisations would require ringfenced funding for research and development in general, but also specifically for determining their marketability, potential audience, and personal interest in cultural export. Showcases and festivals were flagged as important sites for practitioners or organisational representatives to visit, with funding support for travel and networking, in order to understand how they might want to engage with international working.

Micro and small businesses can't afford trial and error.

(craft and design)

It's not just about scale, but it's about those organisations and companies that have been around for a while and got that support, that built those connections, that made the multiple trips, that toured internationally and attended multiple platforms, that are still the most active now. But there's a younger generation that hasn't had anywhere near that support from British Council, from Creative Scotland, from you name it. They just don't have the same connections, opportunities, experience that some of our more established and still, thankfully, touring companies do.

(dance/theatre)

3.3.2.4 Importance of people

The industry network is absolutely critical.

(dance/theatre)

As has been reiterated thus far within both the survey responses and consultation group discussions, relationship building and networking are seen as foundational and fundamental aspects of cultural exports. All of the consultation groups referred to the informal peer networks as having been established in the absence of a formal cultural export framework, but also as being important to international work in general. For developing practitioners and cultural organisations, industry connections on a national and international scale are key to career progression. One participant from the craft, design, and architecture consultation group offered that sharing an address book can be 'more important than completing a deal'.

We need to cultivate the next generation coming through. There has to be some sort of succession thinking going on, because you could quite easily see somebody who's key within an art form and their relationships internationally, then if they choose to retire or worse, then you've kind of lost that.

(producers)

Similarly, it was flagged that the informal nature of these connections meant that if mentorship systems or formal mapping of these relationships were not established, there was a risk of the relational work being lost should the individual who cultivated and maintained these connections leave the sector. Finally, some practitioners raised the importance of reciprocity as part of developing international relationships, noting that as many internationally situated cultural export services provide funding for practitioners and delegation groups to come to Scotland for cultural festivals and events, it would be in Scotland's long-term interest to strategically reciprocate.

I think we've got to be reciprocal. If we're expecting people to come to Scotland to see music, to see art, to see work at the festivals in Scotland, all the other offers that are happening on the ground, we have to also be turning up in a strategic way, in a joined-up way, in other platforms.

(dance/theatre)

3.3.3 Proposed models and framework ideas

It's simple, you know, we need something similar but different.

(dance/theatre)

Across the consultation groups, there was enthusiastic agreement that a cultural export service in Scotland would be beneficial for supporting existing cultural export activity and facilitating its growth and development. Participants described the establishment of such a service as crucial for filling the existing financial and advisory support gaps, as well as facilitating career development for Scottish cultural practitioners and organisations. However, while each consultation group seemed to have a consensus for a preferred approach to such a service, there was not a unified consensus across the groups themselves.

One suggested approach was to increase funding into the existing infrastructure, allowing each sector to independently formalise the work they are already doing. This would require identification of key facilitators of cultural exports in terms of both funding programmes and organisations: identified facilitators within these consultation groups included the Momentum international delegate programme, Publishing Scotland, Craft Scotland, and the Creative Scotland music team. Some participants also raised that there were likely missed opportunities to formally join up with tourism-centric organisations such as VisitScotland for cultural export aspects such as market research and development.

We'd have to recognise existing work that's already there rather than reinvent the wheel. There's a lot of people that put a lot of time into developing really important pathways for artists – really good relationships. And I think building and bringing that knowledge together is key.

(music)

I think the people in our industry who are these connectors are really such an impact. It's the people in Scotland that really make all of these things possible. So somehow supporting these incredible people to keep doing what they're doing in some way.

(producers)

I guess there's an argument to be made that we already have a form of export service in VisitScotland, selling what Scotland is and our culture. And I guess there's an opportunity to review how that supports the creative and cultural industries and that image that they're presenting, how they're utilising the output of the cultural sector and whether there's more opportunities that could come from that.

(reference group)

Another suggested approach was to establish a cultural export service that prioritises music, with Screen Scotland's existing model and the Liverpool City of Music used as reference points. It is worth clarifying that this idea was suggested and discussed solely within the music consultation groups. For some members, an ideal model would be a music-only service operating independently from other disciplines, meaning each other discipline might have their own services or might be united under a more general service. Others suggested that the eventual goal would be a general cultural export service but that a music-specific service should be launched first as a pilot in order to prove the service's benefit.

Obviously, I want to prioritise music, but I recognise that right across the cultural sector, export is essential. My rationale as to why it needs a standalone thing is music is a very specific sector and it's got a lot of nuance, challenges, and opportunities. My fear would be if it was just a part of a broader export service that wouldn't get the specialist kind of time, care, and attention to allow it to really meet its full potential, and a lot of things would still fall through the cracks that we see just now.

(music)

The most commonly suggested approach was a centralised, unified cultural export service with specialist expertise available for each sector – a 'one-stop shop'. Participants in support of this approach noted that while there are elements of cultural export that are shared across the sector and could utilise identical support, such as funding guidance, the different needs of different cultural disciplines could be accommodated by tailored, specialist advice. Some participants offered that many aspects of cultural export are most likely commonplace across the broader cultural sector but are currently framed differently for each discipline: examples included the travel logistics behind touring having common elements with attending showcases or travelling with a delegation, and the same for the sales elements of exhibitions and showcases. Indeed, many consultation groups involved comparisons between disciplines in terms of cultural export priorities and activities.

Crucially, a centralised point for clear advice and guidance on how to work internationally was emphasised as key for accessibility, in particular for individuals, micro-organisations, and small entities who lack the resources to dedicate towards navigating the existing dispersed cultural export ecosystem. Practitioners and organisations working across disciplines and those balancing commercial and creative interests within their cultural export work also raised that a more generalised cultural export service with specialised agents or representatives would better reflect the less strictly categorisable aspects of cultural work.

From the architecture, design and fashion team, our focus is a lot more on kind of exchange and connection and collaborative opportunities and residencies, rather than being able to provide kind of trade missions and visits. We've got kind of less of that kind of research and development time.

(arch/crafts)

The way the publishing and literature works is quite specific. I mean, maybe similar to music to degree, but it has its own structure, its own framing, and its own roles in terms of who sells those rights and so on.

(publishing)

It would seem crazy to have a separate office for each art form. But equally, the ways of working internationally are really different for different sectors. You'd want the organisation to be able to respond to that and react accordingly.

(producers)

It is worth noting that a number of participants raised concerns about what could reasonably be expected of a new service in terms of both activity and funding. Emphasis was placed on the need for invested interest from the Scottish Government, evidenced through increased dedicated funding, in order to support cultural export without detracting from existing cultural funding. Some participants also raised concerns about placing unreasonable pressure on either existing Creative Scotland workers or the hypothetical cultural export service team in terms of expecting an unreasonable amount of expertise or administrative labour from a small number of workers.

The spirit might be willing, but the wallet might be weak.

(trad arts)

I think there is a sort of tendency of people to want other people to do some of the work that is sort of inherently the work of those that make the work, either through a producer or an international tour manager, whatever. I wouldn't be at all surprised if some of the feedback from the sector is for something that is all singing and dancing to kind of relieve them of any need to do it for themselves, but just go off and, you know, play gigs or present exhibitions or whatever. And of course, that's really not going to be possible.

(dance/theatre)

The most referenced cultural export model across disciplines was Culture Ireland, which was noted for its match-funding model for organisations receiving Creative Europe funding – an approach described as not only mitigating risk but motivating greater engagement from European funding bodies. Ireland's broader cultural export success was also attributed by some to the strength of its recognised brand, with one participant noting uncertainty about the specifics of its export activity but acknowledging the clarity and reach of its international profile. Similarly, Catalonia and Latvia were highlighted within literature-focused discussions for their consistency in engagement, brand confidence, and strategic funding approach, wherein recipients are encouraged to apply for follow-on funding that builds meaningfully on their previous funded experiences. South Korea and Canada were both cited as

strong examples of government investment, with the Korea Arts Management Service highlighted in particular, while Finland was noted for its cross-city collaborative approach. Australia, Norway, and Sweden were each raised in the context of music, and recognised for their dedicated music-focused export services.

I don't know what Ireland does in terms of export, I just know their kind of recognised brand.

(literature)

3.4 Findings from interviews

3.4.1 Respondent profile

Interviews were conducted with 13 people representing gaming, film and TV, music, festivals, and enterprise. Interview participants were sought in order to fill knowledge gaps from lack of industry engagement with the survey and focus groups, as well as to gather supplemental insights on export from individuals with notable experience with international work.



3.4.2 Key themes

3.4.2.1 Scotland is falling behind on digital engagement

The games sector faces notable challenges in international representation, with what was once described as 'country representation at a game street show' being a 'phenomenal success' having now diminished to 'next to nothing'. A proposed Scottish presence at major events such as gamescom – distinct from the current UK Pavilion – should be 'soup to nuts', showcasing big studios, universities, indie developers, and 'crossover culture' in order to effectively differentiate Scotland on the international stage. There is also an identified opportunity around Microsoft's global 'Game Camp' programme, which helps communities realise their vision in games, with the programme's lead actively seeking to host one in Scotland. Underpinning all of this is a broader concern that Scotland is not performing as well as other countries in digital representation, with interviewees from the film and TV industry noting that digital engagement should be as important as physical events, not as a replacement for them.

3.4.2.2 Funding experience of Scotland's games and music sectors

Interviewees from Scotland's games industry report that that industry is widely regarded as a 'powerhouse' that

'punches above its weight' underpinned by a tight-knit community, close links with the education sector (particularly Abertay University), and immense global brand recognition for titles like Grand Theft Auto. Recent investments have reportedly reinforced this position, with the Tay Cities Region – including Angus, Dundee, Fife, and Perth and Kinross – recently awarded £20 million in UKRI Local Innovation Partnership funding to establish a research institute at Water's Edge in Dundee that focuses on games and creative digital technologies. Another significant funder is the UK Games Fund, financially supported by the UK government, which reportedly holds £30 million for prototype funding across the UK. This was framed as being beneficial for new entrants in the sector, but it was cautioned that established companies remain in need of support.

The Scottish Game Developers Association, Scotland's 'first and only member corporate membership driven organisation,' represents 26 of the largest games companies. SGDA was particularly commended for its networking and knowledge-sharing efforts across the industry on a national and international level, reportedly organising events in Scotland as well as hosting receptions at overseas conferences in Germany and San Francisco. The association was described as operating on a 'minuscule' budget considering this level of activity, having secured £15,000 from Creative Scotland while receiving some funding through the Scottish Government's entrepreneurial-centric Ecosystem Fund.

International trade was framed as central to the sector, with the UK stated to be the fourth biggest exporter of games globally, but greater export support is reportedly needed for attending key international events. Interviewees from the sector noted that while developers can access general funding through Scottish Edge, Business Gateway, Scottish Enterprise, and Creative Scotland, none of these bodies is tailored specifically to the games industry. Dedicated funding support for helping emerging and small gaming companies become 'investor ready' and better able to understand market needs is reportedly preferable to 'throwing money at the problem'. The majority of the industry was described as digital in nature, making discoverability a primary challenge in an increasingly saturated market.

Turning to music, the funding landscape for artist export work is described as 'patchy', with limited direct artist funding and heavy reliance on the London-based PRS Foundation's International Showcase Fund, which an interviewee stated has 'nowhere near enough money to go around'. Existing application processes were described as cumbersome and slow, with eight-to-twelve-week turnarounds making it difficult for artists to respond to international showcase offers made at short notice.

The Music Export Growth Scheme Fund, run by the British Phonographic Industry in London, is described as allocating only two to three per cent of its funds to Scottish artists, creating an 'underlying bias' against applicants based in Scotland. Broader gaps were described as including a lack of education and guidance around international markets, covering areas such as visa rules, market guides, and appropriate targeting. Current funding models reportedly focus primarily on artists, but interviewees expressed a strong interest in supporting industry development by taking delegations of Scottish managers, labels, agents, and publishers to international events. However, anxiety was expressed about the potential underselling of the budgets that would be required to support this level of cultural export engagement across all sectors, in particular considering Fair Work priorities.



3.4.2.3 Disparity in representation and financial attention in the games sector

Throughout the survey, consultation groups, and the interviews, representatives from across the cultural sector highlighted the contrast of export experiences for larger organisations and more established practitioners as compared to smaller organisations and emerging practitioners. Within

this vein, interviewees from Scotland's games sector characterised the sector as having a handful of highly successful companies – such as those behind Grand Theft Auto – dwarfing hundreds of smaller, less financially successful ones. Edinburgh's Rockstar Games, for example, was described as employing around 1,300 people but not particularly engaged with the broader games sector. The lack of engagement was framed as a lack of need to seek out peer support, knowledge exchange, or funding due to the sufficient scale of its resourcing. In contrast, interviewees recalled that the sector is currently made up of approximately 300 companies in total, of whom around 100 have an 'ambition to grow' and are actively developing.

3.4.2.4 Missed connections: Divisions between culture and business

Views on SDI vary considerably across the interviewed sectors and reflect a point of tension between creative and economic interests that arose frequently throughout the survey, consultation groups, and interviews. SDI representatives offered that many aspects of SDI's work are task based rather than sector specific, a perspective which was broadly reflected in interviews with representatives from the games industry who spoke positively of their experiences with SDI's services. However, representatives from film, TV, and music described the offerings of organisations such as SDI and Scottish Enterprise as being inapplicable to the specifics of work in their respective industries due to a perceived high-growth, digital-leaning support criteria. A representative from the music industry further extended this lack of sector understanding to Creative Scotland, noting that the team was 'really good' but lacked insight into the work patterns and requirements of the music sector.

A recurring concern across sectors is the fragmentation and lack of co-ordination across Scotland's existing cultural export ecosystem as well as within individual disciplines. Music export efforts, for instance, reportedly involve multiple parties with varied approaches and little co-ordination across the genre. Meanwhile, SDI's GlobalScot network reportedly sees significantly low use of their global supports expertise in the creative industries, with only 129 creative companies registered. As an SDI representative noted, 'It absolutely pains me to see Scottish companies repeatedly paying in cash and equity for strategic and tactical business advice that they can get free from GlobalScot.' Integrating creative industries into the network remains challenging, however, due to the commercial focus of the GlobalScot network sitting uneasily alongside the soft power aspect of creative industries, as well as the difficulty of recruiting senior, well-connected, and available voluntary candidates. SDI representatives further offered that their existing internal network of trade envoys would be open to engaging in cultural activities, potentially serving as a 'bridgehead' for a future cultural export service.

On the topic of trade visits, cultural elements were reported to be historically limited to receptions or diaspora events within such visits, with no dedicated trade visits for the creative sector despite screen, games, music, and publishing, for example, presenting distinct opportunities. A further challenge to connecting cultural export with existing mechanisms was broader export activities described as 'making small cultural businesses aware of opportunities to join trade missions', a difficulty compounded by the lack of a collective voice within the creative and cultural industries. Similarly, representatives from film and TV raised that closer collaboration with VisitScotland remains an unaddressed gap, noting that as VisitScotland promotes Scotland as a tourist destination on the basis of Scotland-based film and television productions, developing audiences for Scottish culture ought to be considered part of VisitScotland's remit.

A more structural concern raised across sectors was the concentration of the UK's creative economy in London. The city was described by film and TV representatives as an IP-rich cluster largely due to BBC commissioning, management, governance, and resources being predominantly focused there. According to interviewees, much of BBC Scotland's qualifying output is bought and sold in London and production elements outsourced to Scotland or Wales primarily to meet Ofcom criteria – resulting in minimal economic impact or creative origination outwith London. It was suggested a more

distributed national broadcaster, originating new content across the UK government's envisioned creative clusters, would be a meaningful remedy. As one screen sector participant noted, 'If you have commissioners that are sitting in Glasgow or Belfast or Cardiff or Bristol, then you know that culture will have opportunities, and talent meets opportunity.'

3.4.2.5 Potential service structure in response to anxieties of 'falling between stools'

A recurring theme across both the games and music sectors is the sense of falling between institutional remits. Representatives from the games industry stated that the industry 'falls between two stools' between Creative Scotland and Scottish Government funding, with existing economic support too often focused on sectors like fintech or agriculture, while creative funding is considered inappropriate for the games industry's commercial realities. Business-centric export support organisations such as Scottish Enterprise and SDI were perceived as treating the industry like a 'hot potato' given the industry's intersection of creative, economic, and digital aspects. Similarly, the games industry was described as having a history of feeling ignored by the cultural sector, with specific cultural organisations described as 'categorically want[ing] nothing to do with us'. As such, concerns were raised about the potential for the games industry to 'fall between the cracks again' under any future single overarching Scottish cultural export service – though one interviewee offered the caveat of having a 'gut feeling it should be one body'.

Representatives from the games sector offered that an ideal way forward with the cultural export service remit would be a bespoke service that combines the economic expertise seen as lacking in the creative sector with the cultural expertise seen as lacking in the economic sector, or as one person phrased it, 'asking for the creative to speak to the economic, to speak to the digital'. This call for cross-industry understanding and support was echoed within interviews with music sector representatives, which flagged a need for more funding and policy trust in the cultural export experiences of artists, managers, and producers. Both Creative Scotland and SDI were raised as examples of organisations keen to help but lacking an understanding of the reality of working within the music sector.

3.4.2.6 Music export: Genre-led delivery and the case for a dedicated office

Building on the funding experience outlined above, music sector interviewees offered detailed evidence on how export delivery actually works in practice. Rather than a single co-ordinating body, current activity is delivered by a small number of genre specialists working largely independently: one interviewee described covering 'folk, roots, world, acoustics, traditional Scots language, and Gaelic', while colleagues lead on indie/pop/rock, electronic music, jazz, and classical respectively. This arrangement was described as effective at a genre level but lacking a co-ordinated 'through line' connecting presentation, artist education, and data collection across the sector as a whole. Interviewees pointed to comparator countries – Nordic nations were repeatedly cited – that operate dedicated, music-only export offices, arguing that folding music into a broader cross-art-form service risks diluting a function that already has an identifiable specialist infrastructure of labels, managers, and showcase routes.

A recurring, specific proposal was for a ringfenced onward touring fund for music, an area interviewees noted has provision for theatre through the Made in Scotland Onward Touring Fund but 'nothing' equivalent for music. Interviewees framed an initial pilot at around £500,000, informed by evidence given to the Scottish Parliament's culture committee, and by comparator returns: an evaluation of Showcase Scotland Expo, established in 2012 to extend Celtic Connections' international programme beyond a single month, found a return of £349 for every £1 of Creative Scotland investment. Interviewees also argued that export should be understood more broadly than touring and showcasing alone, citing sync licensing, cultural diplomacy, and inbound activity (Scotland-based businesses working on behalf of international labels) as under-recognised revenue streams, and cautioned that budget expectations anchored to current spending levels of around £3.5–4 million

would leave a dedicated service ‘undersold’, suggesting a more realistic figure closer to £6–6.5 million once travel and existing funders’ contributions were included.

Interviewees were consistent in arguing that current support is skewed toward individual artists rather than the industry around them – managers, labels, bookers and publishers – several of whom operate as one- or two-person businesses funding their own international travel out of pocket. This was described as a structural gap: ‘what really makes an impact to the music economy and the ecosystem is industry development’, rather than artist funding alone, with interviewees calling for delegation-style support similar to that already offered to games and screen sector businesses at international trade events.

3.4.2.7 Publishing: A mature export sector constrained by fragile infrastructure

Publishing was described by interviewees as unusual among Scotland’s creative disciplines in already operating as a fundamentally international industry, sitting ‘at the intersection of culture, stories, business, commerce, intellectual property, and physical product’. Publishing Scotland already delivers a translation fund, an international fellowship bringing overseas publishers to Scotland, and an Author International Travel Fund, and co-ordinates a national presence – branded ‘Scotland in Frankfurt’ and ‘Scotland in London’ – at major international book fairs. Interviewees reported that the translation

fund is oversubscribed relative to its roughly £30,000 annual allocation, which was cited as clear evidence of unmet international demand for Scottish writing rather than of insufficient interest.

A specific and repeated concern was the collapse of Scottish Books International (SBI), a dedicated cross-organisational co-ordination role – sitting between Publishing Scotland and the Edinburgh International Book Festival and covering rights sales, translation, and advocacy – that lapsed during the pandemic and has not been resurrected due to the absence of secure long-term funding. Interviewees were clear that its loss was structural rather than a reflection of need: ‘There was never a secure model to maintain it long-term... it was piecemeal.’ Publishing Scotland was also described as lacking a dedicated head of international

activity, with the function currently absorbed into a membership services role, and as lacking the data infrastructure to evidence the economic return of its international work, weakening the case it can make for further investment.

Interviewees highlighted a stark divide between a small number of well-resourced publishers with established international rights networks and the majority of smaller, independent publishers who cannot individually afford a presence at fairs such as Frankfurt and instead attend under the collective Publishing Scotland banner. Several of Scotland’s most prominent authors, it was noted, are published by London-based houses rather than Scottish ones, meaning export benefit does not automatically flow to the domestic publishing sector. Interviewees also raised branding as a specific opportunity: comparator countries such as Ireland, Latvia, and Catalonia were praised for a clear, consistently



invested national literary identity, with literature repeatedly described as one of the highest-profile and most celebrated of Scotland's art forms, even though, in interviewees' view, no single organisation currently holds responsibility for defining what Scottish literature is or could be on the international stage.

3.4.2.8 Performing arts: Two-way exchange and the limits of 'export'

Interviewees from dance and theatre pushed back most strongly on the framing of 'export' itself, arguing that international activity in the performing arts is inherently reciprocal rather than one-directional, and that any future service 'should always be thinking about two-way and not simply about export'. The term was seen as risking a reduction of complex artistic exchange to 'dumbed down' touring, and interviewees stressed that a healthy international profile depends on a healthy domestic touring base, not the other way around. This distinguishes the sector's framing from the funding- and rights-transaction language used in music and publishing, and interviewees argued any future service would need to accommodate both understandings.

International activity in dance and theatre was consistently described as informal, relationship-dependent, and vulnerable to individual turnover: 'It seems to be sporadic and down to individuals and organisations who have fostered those relationships over time', rather than being institutionally supported or strategic. Brexit's 90/180-day touring rule was cited as a specific, ongoing constraint, alongside the recent closure or suspension of two established European contemporary dance platforms – one a long-running marketplace active for two to three decades, the other a Nordic/Baltic showcase – both attributed to funding pressures across the wider European sector. Interviewees also identified a capacity gap around producers with international touring expertise, noting that producing itself is 'becoming more difficult as a sustainable career in Scotland,' which in turn constrains the number of companies able to take advantage of international opportunities when they arise.

Interviewees pointed to Ireland as a comparator with a stronger, more consistent international profile, attributing this to sustained organisational-level partnerships, a defined pathway for artists moving from domestic platforms to international ones, and a risk-sharing, match-funding model for Creative Europe applications that removed a major barrier to organisations applying. As with the games and music sectors, dance and theatre interviewees also questioned how a future service would reach the majority of the workforce who operate as freelancers, and how it would relate to existing bodies such as the British Council, cautioning that without clear delineation of remits, 'there may be overlap between Creative Scotland, SDI, and this new body'.

3.4.3 Diverging views: Potential support structures

Across the interviews, there were diverging views on the best way forward with establishing a cultural export service in Scotland covering three broad positions: investing in existing provision; creating a new general service; or developing a new sector-specific service.

3.4.3.1 Investing in existing infrastructure

Some interview stakeholders voiced that rather than creating new structures, public investment should focus on strengthening what is already working. Sector autonomy was cited as a particular strength, with Screen Scotland's ability to act quickly and respond to changes in the global sector held up as an existing model of effective provision. By contrast, SDI's lack of connections with the cultural sector was pointed to as a cautionary example of the importance of incorporating specialists within a generalised system.

3.4.3.2 Creating a new general service

Other interview stakeholders argued that existing infrastructure has demonstrably failed key sectors, such as the games industry's reported feeling of being ignored by bodies like Scottish Enterprise, Creative Scotland, and Screen Scotland. Some interviewees also described public bodies as being

poor at collaborating due to protecting their own remits in ways that result in a lack of clearly assigned administration and co-ordination responsibilities. Those who preferred the creation of a new general cultural export service suggested the focus should be on establishing a solid foundational service based on Scotland's existing infrastructural and financial abilities rather than replicating systems from elsewhere.

3.4.3.3 Creating a new sector-specific service

A third position raised by interviewees that any general service risks spreading resources too thinly to be effective. Those who preferred a sector-specific service pointed to cultural export services in Ireland and Wales as having been stretched thin by their multi-art-form approaches, and warned that without significant investment, attempting to be everything to everyone is likely to result in failure. Interviewees who preferred a sector-specific approach felt that meaningful cultural export support would require deep sector knowledge and that a general service – however well resourced – would not replicate the responsiveness and expertise that dedicated provision would offer.

3.5 Synthesis of stakeholder evidence

3.5.1 Key themes

3.5.1.1 Fragmentation and lack of co-ordination

The current cultural export ecosystem is widely described across all stakeholder engagement formats and across respondents from all sectors as disjointed, relying on informally shared knowledge and personal networks rather than any coherent structure. Support is spread across multiple bodies with no single point of access, leading to duplication in some areas and significant gaps in others.

3.5.1.2 Brexit and Covid as structural disruptions

Brexit and Covid are explicitly referenced across all forms of stakeholder engagement as having caused lasting damage to Scotland's cultural export infrastructure. Specifically, Covid is credited with collapsing established and developing networks as well as contributing to creating an experience gap for cultural export management and facilitation, while Brexit introduced new logistical and psychological barriers to international working. As a result, many emerging practitioners no longer consider international work a viable option.

3.5.1.3 Inequity of access and opportunity

The contrast between established and emerging practitioners is raised consistently across multiple sectors within the survey, consultation groups, and interviews. Larger, more established organisations and practitioners are seen as dominating international activity and carrying the least risk, while individuals, micro-organisations, and emerging practitioners face the greatest barriers such as navigating funding timescales, administrative complexity, and the gatekept nature of professional networks.

3.5.1.4 Funding inadequacy and misalignment

Funding is raised as a barrier by the majority of survey respondents and discussed in depth across all consultation groups and interviews. Existing funding is described as insufficient, inaccessible, and poorly aligned with the realities of cultural export – particularly around response times, eligibility criteria, and the proportion of UK-wide funds reaching Scottish applicants. Crucially, the concern is not only about quantity but about the design and timing of funding, this theme a more complex than a straightforward request for increased funding.

3.5.1.5 The gap between creative and commercial support

A recurring tension exists between cultural support bodies, which lack commercial understanding, and commercial support bodies, which lack cultural understanding. As a result, sectors straddling these priorities and requiring support with both aspects such as publishing, games, music, and craft can fall between institutional remits and not feel adequately served.

3.5.1.6 The importance of people and relationships

In the absence of formal cultural export infrastructure, informal networks and personal relationships are identified as foundational to cultural export activity across all sectors. There is concern about the fragility of these networks and the risk of losing institutional knowledge if succession and mentorship are not formalised.

3.5.1.7. Need for investment in domestic talent

While this might appear to be a domestic rather than export concern, stakeholders consistently connect the two, framing international opportunity as both dependent on and generative of domestic talent development. Concerns are raised about underinvestment in emerging talent, with Brexit, Covid, and poor economic conditions having disrupted the ongoing development of professional talent. Building a stronger domestic base is seen as both a precondition for and a product of successful cultural export.

3.5.1.8 Need for increased digital engagement

Although raised primarily in the interviews section, digital engagement is identified as an area where Scotland is actively falling behind other countries. Digital engagement is viewed as a necessary complement to, rather than replacement for, physical presence at events and trade shows, connecting to broader concerns about representation and visibility that run throughout the stakeholder responses.

3.5.1.9 Diverging views on service structure

There is no consensus on the best model for a cultural export service, with three broad positions established: (1) strengthening Scotland's existing cultural export ecosystem, (2) creating a new general service that supports multiple art forms, and (3) developing one or more sector-specific services. In looking to international examples for inspiration, Culture Ireland is the most frequently cited comparator across all stakeholder groups and most sectors, praised for its funding approach, strong branding, and overall dedication to supporting artists on an infrastructural and societal level.

3.5.1.10 Tensions between sustainability goals, ethics, and export

A tension exists between the ambition for increased international activity and Scotland's climate and sustainability commitments, with limited existing frameworks for reconciling the two. While less predominant than other themes, this was raised across multiple research methods and by a sufficient number of respondents to warrant inclusion.

3.5.2 Key priorities based on stakeholder engagement

This work is expensive, time consuming and fraught with risks – in the early years and with inexperienced orgs, this will require considerable hand holding and coaching.

(survey respondent)

Based on the report, the following five priorities have been identified as most critical to developing an effective cultural export service in Scotland:

3.5.2.1 Establishing a clear, centralised point of access

The single most consistent finding across all stakeholder groups is that the current ecosystem is fragmented and impossible to navigate without insider knowledge. A cultural export service must provide a coherent entry point that brings together funding guidance, administrative support, market intelligence, international networks, and clear signposting to other relevant Scottish and UK organisations, opportunities, and services beyond its own remit. This would remove the current reliance on informally shared knowledge and help to make international work accessible to practitioners at all career stages and organisations of all sizes.

3.5.2.2 Addressing funding inadequacy and misalignment

Existing funding is identified as insufficient in quantity, poorly timed, and structurally misaligned with the realities of cultural export. A dedicated service should not only advocate for increased or new funding but also redesign how it is delivered. Key preferences include faster turnaround times for funding decisions, clearer eligibility criteria, and mechanisms that do not force practitioners to choose between domestic and international opportunities.

3.5.2.3 Bridging the gap between creative and commercial support

Many sectors expressed having experienced not fitting in the remits of cultural and economic support bodies, with neither adequately equipped to serve them. Any future service must combine cultural expertise with commercial understanding, ensuring that sectors with hybrid creative and commercial needs are not left without appropriate support.

3.5.2.4 Ensuring equity of access for emerging and smaller practitioners

Across all research methods, individuals, micro-organisations, and smaller entities were repeatedly raised as facing the greatest barriers to engaging in cultural export. A cultural export service must be explicitly designed to serve those with the least resources and experience, through accessible pathways, ringfenced development funding, and proactive outreach rather than passive provision.

3.5.2.5 Formalising and protecting relational infrastructure

Informal networks and personal relationships are currently the primary mechanism through which cultural export operates in Scotland. A cultural export service must recognise and build on this relational infrastructure rather than replace it in order to ensure that institutional knowledge is retained and shared rather than lost when individuals leave the sector.

Case studies of existing international systems



4. Case studies of existing international systems

The following case studies provide a snapshot and mapping of current international export systems. They were selected based on neighbouring countries with a similar population size and funding system as well as countries further afield that were frequently mentioned in data collection as examples of best practice. Whilst these case studies exemplify differing systems paralleled in this report's suggested models for Scotland – there is no one singular model per se – rather countries may have varying pockets of international activity across art forms. For the sake of these case studies, we have focused on one particular system or activity to highlight a particular mechanism of their export system.

Overall, these case studies highlight a variety of mechanisms and supports that propel cultural exports in each respective nation. Some cases like Ireland, Canada and Korea provide a structured and dedicated export system directly connected to government, others support a variety of art forms, such as Norway and Wales, whilst New Zealand and Australia offer exemplars for dedicated music exports.

4.1 United Kingdom

4.1.1 Northern Ireland

Arts Council of Northern Ireland

Northern Ireland does not have a dedicated export system, nor does it have an international cultural strategy. Rather, through partnerships with the UK as well as the Republic of Ireland, Northern Ireland navigates their cultural exports through collaborations as well as a vibrant festival scene in Belfast such as the Book Festival, Outburst, and International Arts Festival, which attract delegates from across the globe. Additionally, the Spotlight on NI at the Edinburgh Festival Fringe is supported by British Council Northern Ireland and The National Lottery through the Arts Council of Northern Ireland showcases quality theatre and dance from Northern Ireland leading to potential international touring and networking opportunities.

Another partnership between British Council and the Arts Council of Northern Ireland is through the **National Lottery Artists' International Development Fund Support for Individual Artists Programme (SIAP)**. This fund is offered by the Arts Council of Northern Ireland and co-funded by the British Council. This fund is open to artists and arts organisations across varying stages of their career across all art forms to boost their international reputation. The fund offers up to £7,000.

Cross-border collaboration is prevalent to the Shared Island Initiative between Northern Ireland and the Republic of Ireland, with many shared island organisations such as Visual Arts and the Heritage Council. New initiatives like the Shared Island Touring Scheme 2026 support creative collaboration through a touring fund between the two. Also, Northern Irish artists may apply to Culture Ireland grants as it is a whole-island initiative.

The Four Nation's International Fund supports creative collaboration between England, Scotland, Wales and Northern Ireland to connect with international cultural partners. The fund is delivered in partnership by Arts Council England, Arts Council of Northern Ireland, Arts Council of Wales/Wales Arts International and Creative Scotland, with Creative Scotland administering the fund on behalf of all partners. There are funds ranging from £1,000–5,000 available, supporting a variety of artistic partnerships either in person, digital or hybrid and ranging from residencies to exchanges and co-creation networking. This fund has emerged in light of the challenges to international collaboration including Brexit, Covid-19 and the climate crisis. In terms of eligibility, it must be a UK applicant with an international partner.

4.1.2 Wales

Wales Arts International

Wales Arts International is the international arm of the Arts Council of Wales. Its role is to nurture international artistic work that is fair to people and the planet. It provides support and guidance for Welsh artists taking work abroad as well as international partners looking to collaborate in Wales. Arts Infopoint UK is an initiative led by Wales Arts International in collaboration with Arts Council England, Creative Scotland, and Arts Council of Northern Ireland. It is a service that provides free advice and resources for artist mobility to and from the UK as part of the On the Move network.

One of the main mechanisms it supports artists is through their grant scheme. This fund supports Welsh artists to present their work, collaborate in a partnership or attend a networking event outwith Wales and the UK. Total funding of £235,000 was available in 2025–26 with applications capped at a limit of £7,500 for international collaboration and presentation to £5,000 for residencies.

4.2 Republic of Ireland

Culture Ireland/Cultúr Éireann

Established in 2005 as a statutory body operating within the remit of the Department of Culture, Communications and Sport, Culture Ireland functions as Ireland's dedicated export office for the international promotion and development of Irish arts across a variety of art forms. Its core purpose is to advance Irish culture on the global stage and to create sustainable pathways for Irish artists to access international markets, platforms and audiences.

Culture Ireland achieves this mission through a variety of funding schemes such as the Regular Grant Scheme, the Showcase Grant Scheme and the See Here Scheme as well as support for regular funded bodies in Ireland and overseas such as the Irish Arts Center in New York and [Centre Culturel Irlandais](#) in Paris. These diplomatic connections are utilised to promote Irish culture and artists.

The tangible employment impact of this work is documented in the Global Ireland 2025 strategy and has generated up to 260 full-time jobs for Irish artists working abroad. This positions Culture Ireland not only as a cultural promotion body but also as a meaningful contributor to the economic sustainability of Ireland's creative workforce at an international level.

According to the Culture Ireland 2025 report, eight million euros is granted from the Irish Government's budget to this export office – this is its highest budget in 20 years, marking a 5 per cent increase from the previous year.

4.3 Norway

Norwegian Arts Abroad

Founded in 2016, Norwegian Arts Abroad (NAA) is a collective network of multiple arts organisations representing a variety of cultural sectors – Office for Contemporary Art Norway (OCA), Music Norway, Performing Arts Hub Norway (PAHN), Norwegian Crafts, Design and Architecture Norway (DOGA), Norwegian Film Institute (NFI) and Norwegian Literature Abroad (NORLA) – who promote Norwegian arts abroad. These organisations collaborate 'collectively addressing common issues, achieving

common goals and creating meaningful synergy' (New Voices from Norway, 2022). NAA operates as sector-specific advisors to the Ministry of Foreign Affairs, issuing grants and export initiatives on the ministry's behalf. In 2022, NAA launched the cross-cultural competency programme, which involved seven teams including an artist and agency from each sector of NAA who were coached and supported by industry experts on how to export their art or project abroad while also gaining network experience at professional events and funding.

4.4 Canada

Creative Export Canada

Founded in 2018, Creative Export Canada is a government agency dedicated to maximising cultural exports in the global market. The Creative Export Strategy supports creative industries on the global stage through funding opportunities, networking opportunities, and providing information and business support. The strategy supports a variety of art forms ranging from craft, performing arts, music, visual art, publishing, design and digital media.

Funding: The Creative Export has two streams:

- **Export-Ready Stream:** The first stream is for 'export-ready projects', with funding available for up to \$2.5 million. This is a highly competitive funding with a limited number of projects funded annually. The funding is for organisations including profit and not-for-profit and eligibility states that there must be a minimum of one full-time employee.
- **Export Development Stream:** The second is for development projects with available funds of up to \$4 million. It is targeted at new or early career exporters. Eligibility criteria is similar to the first except the income of the applicant is expected to be lower than the export-ready stream.

Creative Expert Navigator Service: This service consists of advisors who provide advice for mainly early-stage exporters in navigating creative exports from information of government initiatives and grants to research on international markets.

Budget: \$11 million per annum.

4.5 South Korea

Korean Foundation for International Cultural Exchange

The Korean Foundation for International Cultural Exchange (KOFICE) operates under the remit of the South Korean Ministry of Culture, Sports and Tourism. Its primary mission is to establish a network hub connecting Korea to the world through culture, working towards this through a broad range of international cultural activities and support mechanisms.

KOFICE's programme of work encompasses several distinct strands. Cultural exchange events form a central strand of its activity, including the [Kore-A-Round Culture](#) initiative, which supports both inbound and outbound cultural exchanges through structured collaborations with nine countries, among them Scotland. Alongside this, KOFICE provides research, professional development opportunities and international networking support for Korean cultural practitioners.

A consultancy function operates to streamline expertise and resources across multiple arts organisations, offering bespoke advice on international collaborations spanning different art forms. For individual artists, the K-arts on the GO initiative provides financial support covering travel and accommodation costs for Korean artists invited to exhibit or perform abroad. Eligibility is linked to the organisation's online platform directory, which lists over 700 artistic platforms across 71 countries, ensuring that supported activity is directed towards established international presenting organisations.

At a larger scale, the Touring K-Arts programme supports and advances the international touring of Korean artists, delivered in collaboration with 42 Korean Cultural Centres operating globally.

4.6 New Zealand

Outward Sound

Outward Sound was established in 2005 by the New Zealand Music Commission following several years of consultation with the music industry. It was created to provide assistance for market development initiatives and to encourage the entry of New Zealand music and musicians into global markets.

This initiative provides funding (50 per cent contribution towards costs) for artists to take their music to a global audience. Composers, bands, and producers can apply at different stages of their careers, and it is inclusive of all genres. Within the five funding rounds, there are two streams available: the Business Development Grant up to \$5,000 (i.e. projects up to the value of \$10,000) and this covers a visit abroad to markets to network and connect with other industry professionals; and the International Market Development Grant (up to \$50,000 projects up to the value of \$100,000). This covers a variety of costs from touring, marketing performing, showcasing and flights, visas and accommodation. These applicants are required to submit an international market and business plan when applying. Outward Sound also provides smaller grants for delegates to attend music markets abroad.

4.7 Australia

Sounds Australia

This is Australia's dedicated music export office, founded in 2009 and funded by the government and industry partners. Its goal is to increase contemporary music exports. It achieves this goal through a variety of strategic activity – it is not a funding body and provides support in the following ways, propelling 2,000 artists overseas since it was created.

- **International performance opportunities:** Supported artists decide if they are export ready, create showcases based around Australian artists who have been programmed by the showcase Sounds Australia's do not provide this. Unlike festivals that are for the public, showcases offer a highly professionalised environment for business opportunities.
- **Networking:** Opportunities to build connections with partners overseas whether at conferences, festivals, or showcasing events from jazzahead! to South by Southwest. There was a focus to enter the US market in particular and advocacy for simpler visa routes for artists.
- **Advice:** Provide guidance and advice for artists in all career stages on markets, how and when to export as well as their strategies and opportunities and practical advice on visas, carnets, insurance and tax.
- **Inbound opportunities:** Invite international delegates to Australia to see musicians perform on their home soil.
- **BIGSOUND Australia:** Funded by the Queensland government and produced by Qmusic, this is a giant three-day networking and showcase opportunity for export-ready musicians in Australia, leading to international markets and opportunities and delegates consist of other artists, industry professionals, bookers and producers.

Budget: \$1.16 million Australian government funding from 2016–17 to 2019–20 to Sounds Australia. Music exports attributed \$975 million to the total Australian music industry revenue according to the 2025 *The Bass Line: Charting the Economic Contribution of Australia's Music Industry* report.



Implications for Scotland

Celtic



5. Implications for Scotland

5.1 Key findings

Taken together, the evidence gathered through this research points to a consistent and reinforcing set of conclusions about Scotland's current position and what would be required to meaningfully improve it.

Scotland has a strong international cultural reputation and a body of genuinely export-ready work across multiple art forms. What it lacks is the infrastructure to convert this into sustained international careers, diversified markets, and equitable access to opportunity across the sector.

The current ecosystem is fragmented across agencies with overlapping remits, inconsistent sector expertise, and no co-ordinating intelligence or fast-response funding capability. Brexit has imposed new logistical and financial costs that the sector cannot absorb unaided. Covid disrupted established networks and created a significant experience gap among emerging practitioners. The combined effect is a sector that is internationally active but institutionally under-supported.

The comparator evidence is instructive without being prescriptive. Culture Ireland, Sounds Australia, Music Norway, Creative Export Canada, and the Korean creative content agencies have each demonstrated that deliberate government investment in cultural export infrastructure produces measurable results – in artist careers, national reputation, co-productions, and sector revenue. In each case, the investment was proportionate to ambition, the governance was designed for commercial agility, and the service was built with genuine sector expertise at its core. Scotland currently has none of these elements in place in a co-ordinated form.

The key finding is not that Scotland needs more of what it already has. It needs something genuinely different: a service with a clear mandate, fast funding mechanisms, sector-deep expertise, and the authority to act proactively rather than reactively.

5.2 Strategic design principles

Whatever structural form Scotland's cultural export service ultimately takes, the following design principles should govern its development. They are drawn directly from the research evidence, from the stakeholder consultation, and from what the comparator case studies consistently identify as the difference between services that deliver and services that do not.



Act at commercial speed. International cultural opportunity does not operate on public funding timescales. Fast-track funding decisions, delegated authority, and pre-approved packages for specific opportunity types are not administrative niceties – they are structural requirements.

Combine cultural expertise with commercial capability. The gap between how cultural organisations understand international activity and how commercial export agencies understand it is a structural fault line in the current system. A future service must bridge it, not choose sides.

Design for the full range of the sector, not the established end of it. Existing international activity is concentrated among established organisations and practitioners. A future service must be explicitly designed to serve those at earlier stages of their careers and with less institutional resource – through accessible pathways, ringfenced development funding, and proactive outreach.

Build on existing infrastructure, do not replace it. Scotland already has organisations, relationships, and accumulated expertise in international cultural work. A new service should commission, co-ordinate, and leverage these assets rather than duplicate them or render them redundant.

Formalise the relational infrastructure. Informal networks and personal relationships are currently the primary mechanism through which international cultural activity happens in Scotland. These need to be mapped, supported, and made resilient through succession planning and institutional embedding – not merely acknowledged.

Establish multi-year funding security from the outset. Comparator services that have succeeded – Culture Ireland, Sounds Australia, Creative Export Canada – were all built on multi-year funding commitments that allowed them to develop long-term international relationships and make decisions at the speed the market requires. Annual funding cycles are incompatible with effective cultural export work.

Invest in a distinct Scottish cultural brand and identity. The international comparator case studies reviewed in Section 4 consistently show that successful export services combine practical infrastructure with a clear, confident sense of national cultural identity. This is something Scottish Government should build into the design of any model from the outset, regardless of which structural option is ultimately chosen: a strong, distinctive Scottish cultural brand is valuable overseas, helping international partners and audiences recognise and place Scottish work, and it also functions as a quality endorsement at home, reinforcing public and sector confidence in Scotland's creative reputation. Branding and identity work should therefore be treated as a foundational design principle rather than an optional addition to be considered later.

Be honest about what the service is not. A cultural export service cannot replace the work of agents, managers, tour bookers, and producers. It can reduce friction, share risk, build capability, and open doors – but the creative and commercial work of international presence must remain with the artists and organisations themselves. Clarity about this from the outset will prevent unrealistic expectations and structural overload.

5.3 Opportunities for intervention

The research identifies six distinct points at which targeted intervention could produce disproportionate improvement in Scotland's cultural export performance.

A single point of access and intelligence. Establishing a clear, well-resourced entry point that brings together market intelligence, funding guidance, network connections, and administrative support would immediately address the most universally cited barrier – the fragmentation and opacity of the current ecosystem. This alone would reduce the informal network advantage that currently privileges established practitioners.

Fast-response funding for time-sensitive opportunity. A dedicated, rapid-response fund with delegated authority to make decisions within days rather than weeks would unlock a significant volume of currently missed international opportunity, particularly for music, performance, and events-based work where offers are made and retracted quickly.

Post-Brexit administrative and legal support. Visa navigation, carnet and customs support, and clear guidance on EU touring regulations represent a practical and specific gap that a dedicated service – or a contracted specialist function – could address directly. This is particularly acute for smaller touring organisations and individual artists.



Structured delegate and showcase investment. Strategic investment in bringing international programmers, curators, publishers, and buyers to Scotland – and in taking Scottish delegations to priority international markets – offers high leverage relative to cost. The Momentum model demonstrates the value of this approach at festival scale; extending it to sector-specific events would significantly expand Scotland's international visibility. This activity should be positioned as part of a coherent strategy that builds on, complements, and reinforces Scotland's attendance at international showcases and events, rather than operating as a series of standalone initiatives.

Export readiness and commercial capability development. A structured programme of training, mentorship, and market immersion – covering IP, rights, contract negotiation, market selection, and international business development – would build the skills base that the sector currently lacks and reduce dependence on informal knowledge transfer.

Scotland's digital and games sector. The games industry is currently under-served by both cultural and commercial support bodies. Scotland's games sector – centred on Dundee but with growing hubs in Edinburgh and Glasgow – is internationally significant and presents a specific, underexploited export opportunity that a future service with the right sector expertise could directly address.

5.4 Potential economic benefits

While this study was not commissioned as a full economic impact assessment, the available evidence suggests that targeted investment in cultural export infrastructure has the potential to generate economic returns beyond the direct cost of the service itself.

Scotland's International Culture Strategy notes that cultural exports accounted for approximately 4.7 per cent of Scotland's total exports, demonstrating that culture already contributes meaningfully to Scotland's international economic activity. The evidence gathered through this study suggests that this activity is occurring despite significant structural barriers rather than because of dedicated export support infrastructure.

Additional export growth

International comparator evidence indicates that dedicated cultural export services can support growth by:

- increasing international sales and commissions
- supporting touring and showcasing activity
- expanding intellectual property licensing and rights revenues
- increasing international co-production activity
- developing new international markets.

Even modest growth in cultural exports resulting from improved co-ordination and support could generate economic benefits significantly exceeding annual operating costs.



Leveraging existing investment

Stakeholders consistently reported that international opportunities are often lost because of relatively small barriers, including:

- lack of timely advice
- limited travel funding
- visa and customs complexity
- insufficient market intelligence
- slow funding decisions.

A future service would therefore not be creating activity from scratch but enabling greater returns from existing public and private investment in Scotland’s cultural sector.

Lessons from comparator countries

International examples demonstrate that export-focused cultural infrastructure can contribute to wider economic outcomes:

Country	Example outcome
Ireland	Culture Ireland reports sustained international touring and has linked activity to employment creation for Irish artists working internationally
Australia	Music exports were estimated to contribute approximately AUD \$975 million annually to Australia’s music economy
Canada	Creative Export Canada was established specifically to increase international revenues and global market access for Canadian creative businesses
South Korea	Long-term investment in cultural export infrastructure has supported substantial growth in international creative content markets

This section deliberately does not overclaim the economic case. It sets out a plausible economic rationale, comparator evidence that investment of this kind can work, and a sense-check that the £4–10 million funding range under consideration in this report is not disproportionate relative to potential returns. It also situates cultural export within a broader economic ecosystem spanning publishing, games, design, festivals, screen and performing arts, rather than music alone.

5.5 Risks of inaction

The assumption that the status quo is a neutral baseline is not supported by the evidence. The risks of inaction are active and compounding.

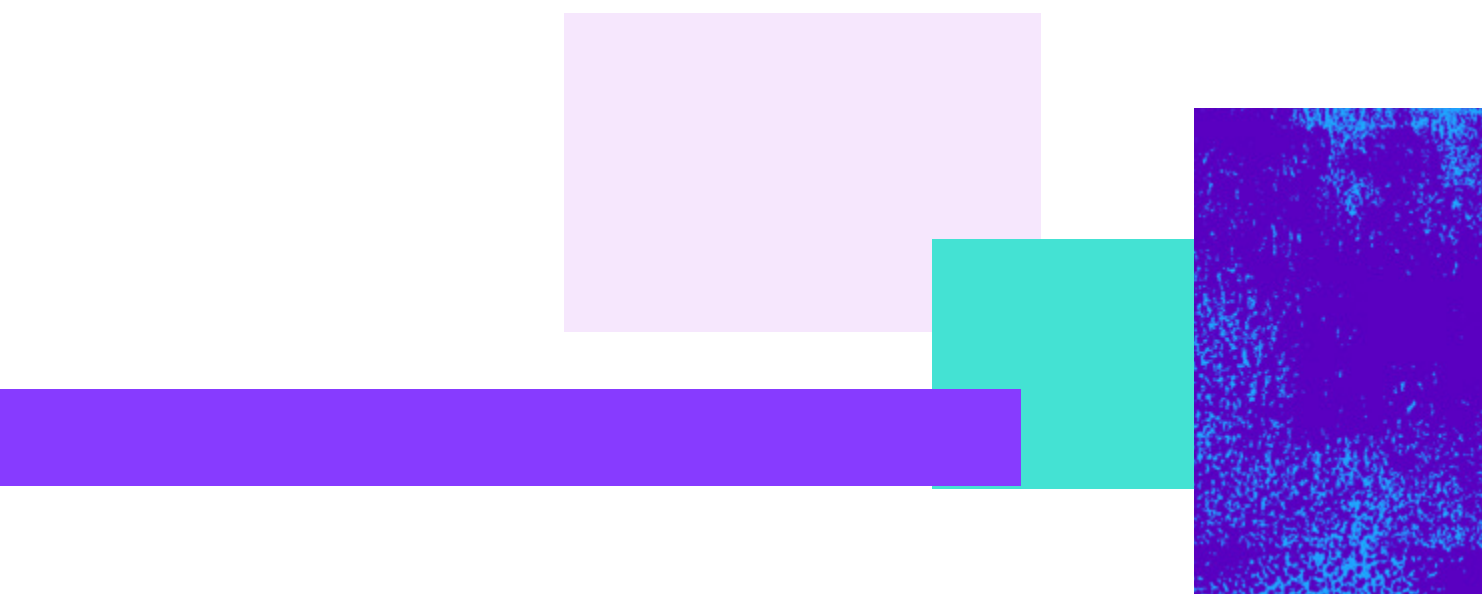
Loss of competitive position. Countries with structured cultural export infrastructure are increasingly viewed as lower-risk, higher-value partners by international programmers, publishers, and co-producers. Scottish practitioners and organisations are beginning to be perceived as comparatively expensive and administratively complex. This reputational shift, if unchecked, will reduce the volume of international opportunities that reach Scotland in the first place.

Loss of a generation of internationally active practitioners. The experience gap created by Covid is not healing at pace. Without structured support for emerging practitioners to engage with international work, the sector will continue to concentrate international activity in a diminishing cohort of established artists and organisations – increasing fragility and reducing diversity.

Loss of relational infrastructure. The informal networks on which Scotland's international cultural activity currently depends are concentrated in individuals. As those individuals move on, retire, or move out of sector, the knowledge and relationships they hold will dissipate unless they have been formalised and shared. This is not a future risk – it is already occurring.

Policy credibility. Scotland's International Culture Strategy 2024–30 commits explicitly to establishing an export support service. Failure to act on this commitment will undermine sector confidence in the government's cultural policy ambitions more broadly and reduce willingness to engage with future consultations.

Unrealised economic potential. Cultural exports already account for 4.7 per cent of Scotland's total exports. With co-ordinated support, market development, and reduced friction, this figure could be materially increased. Without it, the ceiling on Scotland's international cultural economic contribution remains artificially low.



Options for a **Scottish Cultural Export Service**



6. Options for a Scottish Cultural Export Service

Before considering options, it's reasonable to address the question: why propose a new co-ordinating function at all, rather than increasing funding to existing bodies such as Creative Scotland, British Council Scotland, or Scottish Enterprise? The evidence gathered through this study suggests the issue is not primarily a lack of activity (and each of these bodies already does valuable work) but the absence of any single body with a clear overarching remit, proactive mandate, and commercial-speed, decision-making authority to act as Scotland's cultural export function.

Existing bodies are, variously, task-based rather than sector-specific, and are either oriented primarily toward domestic creation rather than international market access or structured around funding cycles too slow for how international opportunity actually arises. None of the four options that follow proposes duplicating existing provision: each is designed to commission, co-ordinate, or work through existing bodies rather than replace them, and the case for a new co-ordinating function rests on evidence of a structural gap, not a judgement that current provision is poor.

6.1 Commissioning Core Model

6.1.1 Description

A lean, expert-led commissioning core that proactively identifies and packages high-potential cultural export opportunities, working through a networked national ecosystem and balancing commercial ambition with cultural integrity. This option proposes the creation of a small, expert-led Scottish Cultural Export Partnership (SCEP), operating as a commissioning and brokerage core within a wider, decentralised cultural export ecosystem. Rather than building a large new centralised agency, or simply embedding export responsibilities within existing bodies, the model rests on four elements working together: a lean central team with specialist expertise; a formalised network of delivery partners; a clear commissioning authority and budget; and a proactive, opportunity-led operating approach. Together, these allow the Partnership to act as the strategic and operational catalyst for Scotland's cultural export activity, balancing commercial ambition with cultural diplomacy and public value.

The model responds directly to weaknesses identified in the existing cultural export ecosystem: export opportunities are fragmented across organisations; existing structures are not consistently proactive or strategically aligned; there is a persistent tension between commercial growth and cultural diplomacy; specialist export expertise in markets, IP, finance and international networks is unevenly distributed; and cultural export activity is too often person-led rather than institution-led.

6.1.2 Structure

6.1.2.1 Legal and governance position

The Partnership would operate at arm's length from government while receiving core public funding, governed by a small strategic board or steering group working to clear terms of reference aligned with government priorities and held accountable for its performance and outcomes. It would not sit fully inside government but would maintain close policy alignment, using language and reporting frameworks familiar to government commissioners.

6.1.2.2 Core team (small, expert-led)

The Partnership would be run by a lean central staff of around four to six full-time equivalents: a Director or Head of Cultural Export, a Market & Intelligence Specialist, a Commercial & Investment Specialist, an International Partnerships Lead, a Legal/IP & Contracts Advisor (in-house or retained), and an Operations & Finance Manager. This is not a grant-distribution body alone; it is a specialist commissioning and brokerage core.

6.1.2.3 Commissioning authority & central fund

The SCEP would control a central bank account, a flexible commissioning budget, and the authority to allocate targeted export packages. To avoid indiscriminate grant distribution, support would be selective, fast-tracked, opportunity-led, time-bound, and subject to quality thresholds.

6.1.3 Operations

6.1.3.1 Proactive and selective

The Partnership would identify high-potential export opportunities, apply quality thresholds, fast-track viable projects, and work at commercial speed where required. This model recognises that international markets require agility and decision-making timelines that differ from traditional public funding cycles.

6.1.3.2 Commissioning packages

Rather than open-ended grants, the SCEP would commission structured packages that may include market development support, co-production investment, strategic touring partnerships, trade mission brokerage, IP and legal support,

brand positioning, and distribution partnerships. Each package would carry clear outcomes, defined timelines, and reporting and repayment conditions where appropriate.

6.1.3.3 Grant-with-conditions/Recoupment model

Drawing on screen-sector precedents, some awards would include repayment or recoupment clauses, with investment returns of around 10–15 per cent, creating partial financial recycling and building longer-term organisational resilience and independence. This blends public investment with commercial discipline.



6.2 Global Culture Platform Model

6.2.1 Description

A co-ordinated national cultural export system that combines digital infrastructure, co-production treaties, diaspora activation, and city-based export hubs, rather than relying on a single central export agency. Rather than building a traditional export agency or a sector-specific office, this model establishes a strategic national platform that aligns policy, digital infrastructure, co-production frameworks, diaspora networks, and city-based cultural hubs into a co-ordinated export system. It treats cultural export variously as a strategic national economic sector, following Korea's approach; a soft-power and sovereignty tool, following France; a diaspora-enabled amplifier, following Ireland; a city-and-festival-driven showcase network, following the Netherlands; a digital-first, scalable content strategy, following Nigeria; a treaty-enabled co-production gateway, following Canada; and a function delivered through co-ordinated existing agencies, following Australia. This is a system-building model, not simply a funding body.

6.2.2 Structure

Rather than centralising everything into one body, this model works by establishing a small Strategic Export Unit within government or at arm's length, creating a formal inter-agency Cultural Export Council, developing a national digital export platform, building a treaty and co-production framework unit, and formalising diaspora and festival export hubs. It is a co-ordinated architecture, not a standalone mega-body.

6.2.2.1 Five strands of the model

The model is built around five strands, each drawing on a different international comparator and addressing a distinct dimension of cultural export.

Strand 1: Strategic sector status (Korea model)

Under this strand, Scotland formally designates culture as a strategic export sector, underpinned by multi-year, industrial-style planning, a focus on IP protection, investment in digital infrastructure, co-ordinated international marketing, and a skills pipeline linked directly to export outcomes. In practice, this means setting export targets across creative sectors, mapping priority markets such as North America, the Nordics, and Australia, and establishing national brand coherence under a 'Brand Scotland – culture' banner. This aligns cultural export with trade, tourism, enterprise, and international policy.

Strand 2: Cultural sovereignty and market access (France and Canada model)

This strand combines domestic protection mechanisms – strengthening the commissioning of Scottish content, incentivising IP retention, and applying cultural criteria within funding – with an expansion of co-production and treaty arrangements: extending bilateral cultural co-production agreements, simplifying access to international funding, developing model contracts, and supporting navigation of tax and other incentives. Rather than competing purely on scale, Scotland would leverage treaty-enabled access, favourable regulatory frameworks, and strategic partnerships.

Strand 3: Digital-first export driver (Nigeria and Korea model)

This strand creates a Scottish Cultural Digital Platform that aggregates export-ready content, hosts B2B marketplace functions, provides curated sector showcases, enables streaming partnerships, and facilitates digital touring and hybrid events. Rather than a public streaming site, this would function as a secure, global-facing industry portal and digital content accelerator, offering digital content development grants, training in platform monetisation, and support for scalable, high-volume content models where appropriate. This allows low-cost, scalable international reach, reduces dependency on physical touring, and enables market testing ahead of touring commitments.

Strand 4: Diaspora and cultural embassy network (Ireland and France model)

This strand formalises a Scottish Cultural Diaspora Network – identifying key global cultural figures,

developing an ambassador programme, activating Scottish-linked festivals abroad, and supporting diaspora-led cultural hubs – while also leveraging existing British Council infrastructure, cultural institutes, and government overseas offices, not by duplicating them but by embedding Scottish cultural strategy within them.

Strand 5: City and festival export hubs (Netherlands model)

This strand designates key cities as Export Cultural Hubs, each built around existing strengths: Glasgow for music, performance and film; Edinburgh for literature and festivals; Dundee for design and games; Inverness and the Highlands for folk, Gaelic and heritage; and Aberdeen for visual arts and craft. These hubs would host structured international delegate programmes, develop city-brand export strategies, act as recurring showcase platforms, and align tourism with cultural diplomacy. Festivals become structured export platforms, not just events.

Governance model

A small Strategic Export Unit of six to eight staff – a Strategy Director, a Co-production & Treaty Lead, a Digital Platform Director, a Diaspora & Partnerships Lead, a Data & Impact Analyst, and Sector Liaison Officers – would sit alongside a quarterly Cultural Export Council, bringing together Creative Scotland, the enterprise agencies, trade departments, tourism bodies, sector representatives, and the major cities. This structure is designed to prevent the fragmentation seen as a risk in Australia's more devolved model, without creating a heavy central bureaucracy.

Funding model

Rather than a single large funding pot, investment is layered across strategic unit core funding, digital platform investment, a co-production and treaty facilitation fund, sector-led touring and market development funds, city hub co-investment, and a diaspora activation fund. Estimated effective annual system investment is £8–10 million across these multiple budget lines, delivered through co-ordinated allocation rather than a single grant round.

What makes this model different

This is not a single grant-distributing office, a music-only solution, a centralised mega-agency, or a reactive touring fund. It is instead policy-aligned, digitally enabled, treaty-driven, diaspora-leveraged, city-anchored, and co-ordinated across agencies – a system-building approach rather than a conventional funding body.

6.3 Cultural Export Accelerator Model

6.3.1 Description

A lean, market-facing Cultural Export Accelerator that reduces friction, shares risk, builds commercial capability, and repositions Scotland globally, rather than simply distributing export grants. Instead of primarily distributing grants or co-ordinating agencies, the Scottish Cultural Export Accelerator (SCEA) would operate as a market-facing deal enabler, a risk-sharing mechanism, a skills and contract capability builder, and a brand and perception shaper – focused on solving the structural barriers of access, risk, knowledge, visibility, and perception. The model assumes that Scottish culture is strong, but under-supported at the interface with international markets.

6.3.2 Structure

The SCEA rests on three working assumptions: that export failure is often about friction rather than quality; that small interventions at the right stage can unlock disproportionate impact; and that risk mitigation matters more than subsidy alone.

Legal status

SCEA would operate as an arm's-length public body with a lean central team of six to eight full-time equivalents, delegated authority to enter into partnership agreements, and a multi-year funding agreement.

Core operating framework

The Cultural Export Accelerator operates through four interconnected drivers, outlined below.

Driver 1: Market gateway and representation network

This driver addresses fragmented access and weak international positioning. It would build sector-specific 'market desks' covering music, screen, visual arts, literature, and digital, maintaining curated databases of festivals, distributors, agents, and commissioners; provide direct brokerage introductions; represent Scotland strategically at priority markets; and operate as a first point of contact internationally. Rather than waiting for artists to navigate markets alone, the Accelerator would actively open doors.

Driver 2: Risk-sharing and deal support facility

This driver aims to reduce the financial and logistical barriers to export. Instead of large grants, it would offer micro co-investment through matched funding, export guarantee schemes covering part of travel risk, visa and logistics concierge support, insurance pooling schemes, feasibility grants for market testing, and structured recoupment where applicable – shifting support from subsidy toward risk mitigation.

Driver 3: Export readiness and commercial capability programme

This driver closes skills and knowledge gaps through a mandatory, structured three-level pathway. Level 1, Awareness, covers introductory export training, digital distribution basics, and IP fundamentals. Level 2, Ready, covers contract negotiation workshops, licensing and co-production training, and market-specific briefings. Level 3, Accelerator, provides one-to-one commercial mentoring, legal and IP advisory sessions, market immersion placements, and international partner shadowing. Export support would be conditional on completing readiness training, building long-term structural capacity across the sector.

Driver 4: Brand Scotland – culture reframed

This driver addresses gaps in perception and visibility by developing a unified, global-facing cultural brand narrative, sector toolkits for international pitching, a digital showcase platform, curated annual international campaigns, and a collective presence at priority markets – moving the brand beyond 'traditional Scotland' toward a contemporary, innovative, hybrid, global Scotland.

Policy and treaty interface unit

Embedded within SCEA, this unit provides a co-production advisory desk, treaty navigation support, tax incentive guidance, regulatory interpretation support, and advisory alignment between domestic grants and export opportunity – acting as a translation layer between policy frameworks and practitioners.

Diaspora and soft power activation

Soft power is embedded within the model but is not its main purpose. This includes a curated diaspora ambassador circle, sector champions, strategic cultural moments such as focus-country years, and reciprocal partnerships developed through embassies and government offices, rather than broad cultural diplomacy rhetoric.



Festival and city activation strategy

Festivals become export accelerators rather than just cultural events. SCEA would not run festivals directly; it would certify 'Export Platform Festivals', co-invest in curated international delegate programmes, co-ordinate city export branding, and support regional hubs in Inverness, Dundee, Aberdeen, Glasgow, and Edinburgh.

Governance

The SCEA board would combine commercial export expertise, sector practitioners, legal and IP expertise, a Creative Scotland representative, trade and enterprise representation, and international relations expertise such as the British Council, supported by advisory panels organised by sub-sector.

Financial model

An initial operating scale of £4–6 million annually would be allocated approximately as follows: 25 per cent to the risk-sharing fund, 25 per cent to market gateway and representation, 20 per cent to training and mentorship, 15 per cent to branding and the digital platform, and 15 per cent to policy and treaty support and operations – a structure with lower central overhead than traditional grant bodies.

What makes this model different

SCEA is a structured accelerator, a risk-mitigation system, a capability builder, a market-interface specialist, and a brand repositioning mechanism.

Direct alignment to challenges

The model is designed to map directly onto the challenges identified elsewhere in this report: fragmented networks are addressed through market desks and brokerage; budget constraints through risk-sharing and micro co-investment; the visa and logistics burden through concierge and pooled support; IP and contract gaps through commercial mentoring; treaty complexity through a dedicated advisory unit; weak branding through a unified export narrative; and isolation through collective presence campaigns.

Five-year outcomes

Over five years, the model is intended to deliver a higher export conversion rate, reduced touring losses, stronger IP retention, improved global perception, increased co-productions, more sustainable creative careers, and stronger alignment between domestic funding and international opportunity.

6.4 Cross-Sector Hybrid Model (Music-First Phase)

6.4.1 Description

The model is named the Cross-Sector Hybrid Model (Music-First Phase) to make clear, from the outset, that it is conceived as a cross-sector service for Scotland's full creative economy and not a music-only initiative – an important distinction for building support across the wider sector.

It would be a national Cultural Export Service with a fully powered Music Export Division at its core, building outward into other sectors over time while combining commercial agility with cultural diplomacy and ecosystem growth. This model establishes a Scottish Cultural Export Service (SCES) as a national umbrella body with a Music Export Division as its first and largest operational strand. It recognises that music has immediate export readiness and scale; that touring economics require specialist, fast-moving support; that a broader cultural export framework remains strategically important; that spreading initial budget across all art forms risks lack of impact; and that political viability requires cross-sector inclusion. The model therefore adopts a 'music-first, expand-outward' approach, building infrastructure and credibility through music while creating a scalable structure for other sectors over time.

Music was selected as the initial operational focus for four main reasons: it generated the strongest demand for dedicated export support during stakeholder engagement; it already has identifiable export infrastructure, including Wide Days, labels, managers, and showcase routes; export opportunities arise at commercial speed, making current funding limitations especially damaging; and comparator countries frequently use dedicated music export offices as an entry point to wider cultural export systems, with music exports generating benefits across a broader ecosystem including venues, festivals, agents, technicians, managers, and tourism.

Core design principles

The model's core design principles are to start where scale and readiness exist, in music; to avoid dilution of limited funding; to retain cross-sector strategic coherence; to operate at commercial speed; to embed cultural diplomacy and soft power objectives; and to build an expandable framework from the outset.

Objective basis for sequencing, and year-one benefits beyond music

Music's position as the first fully developed division is based on four objective, evidence-based criteria applied consistently in this report, rather than on sector preference:

- Demonstrated export readiness and scale.
- The strength of existing specialist infrastructure to build on.
- The urgency created by the pace at which international opportunity currently arises.
- Precedent from comparator countries, several of which use a dedicated music export function as the entry point to a wider cultural export system.

Music scores most strongly against all four criteria at this stage, and this is reflected in its sequencing, not in an assessment that music matters more than any other art form.

That said, the model should be styled as a cross-sector body, with several functions that benefit every sector from year one rather than from year two onward. The central strategic hub's market intelligence, international relations, cultural diplomacy, and Brand Scotland positioning functions, described in Section 6.4.2, are cross-sector by design and available to practitioners in any art form from the Service's launch. The equity



and identity design principles set out in Section 5.2 apply to the Service as a whole, not to music alone. A structured co-design process, described in Section 9.3, brings practitioners from across art forms into shaping both the Music Export Division and the sequencing plan for the sectors that follow it, so that Phase 2 sector units reflect what practitioners in those sectors actually need rather than a template carried over from music. The phased structure prevents the dilution of limited funding across all art forms at once, which the evidence in this report indicates would risk delivering meaningful support to none.

6.4.2 Structure

Legal status

SCES would be established as an independent national body, operating at arm's length from government, underpinned by a multi-year public funding settlement of a minimum of three to five years, with a clear performance framework aligned to economic growth, international engagement, cultural diplomacy, and sector sustainability.

Central core (small strategic hub)

The central core would be responsible for strategy, government alignment, finance and commissioning authority, data and evaluation, international relations, and Brand Scotland positioning, staffed by (for example) a Chief Executive, a Director of Strategy & International Relations, a Head of Finance & Operations, a Data & Evaluation Lead, and a Policy & Government Liaison.

Music Export Division (primary operational arm)

This fully staffed specialist unit would operate with commercial agility and industry fluency, covering a ringfenced onward touring fund, genre-specific market leads, international partnerships, inbound delegations, agent and buyer relationships, export-readiness programmes, and touring logistics support. Genre leads would cover indie/pop/rock, electronic, classical, jazz, and folk/roots/traditional/Gaelic music.

Emerging sector units (Phase 2)

Developed from the outset, with the Phase 2 remit expanding progressively over years two and three of operation as funding and readiness allow, other sectors would be integrated progressively depending on readiness and funding: screen and audiovisual (provided this does not duplicate Screen Scotland), literature and publishing, crafts and design, performing arts, heritage and cultural tourism, and digital/interactive. These units may operate as lighter-touch specialist desks, commissioned partnerships with existing sector bodies, or embedded secondees from sector organisations, with music remaining the largest division in the early years.

6.4.3 Funding model

Initial annual funding target

The initial annual funding target is £6–7 million at full operational phase, allocated approximately 50–60 per cent to the Music Export Division (covering the touring fund and staffing), 15–20 per cent to the central core, 15–20 per cent to emerging sector pilots, and 5–10 per cent to international partnership and diplomacy programmes.

Touring fund (music – ringfenced)

An initial pilot of £500,000 would grow toward a long-term aim of £2–3 million per annum, supporting flights, visas, freight, crew, and time-sensitive opportunities through a fast-track approval process.

6.4.4 Operating model

Proactive and selective

The service would apply quality thresholds for export-ready artists and organisations, operate fast response windows, offer structured packages rather than passive grants, and apply recoupment clauses where appropriate for commercial projects.

Commissioning framework

SCES would control a central bank account, targeted export packages, co-investment structures, and partnership funding agreements, governed by clear timelines and accountability mechanisms.

Cultural diplomacy and soft power

SCES would support international memoranda of understanding, focus-country programmes, government-to-government cultural agreements, a diaspora engagement strategy, reciprocal festival partnerships, and inbound delegate programmes. Music would often lead these engagements but would also open pathways for other art forms.

Ecosystem development

Export is not only about artists: the service would also support agents, producers, crew, marketing professionals, festivals, and conservatoires. When artists export successfully, the wider ecosystem strengthens, domestic festivals benefit, tourism increases, and Scotland's global brand deepens.

Governance

The board would combine industry specialists from music and across sectors, Creative Scotland representation, trade and enterprise representation, cultural diplomacy expertise, major funders such as PRS, and an independent chair. The service would avoid embedding fully within Creative Scotland in order to preserve commercial agility, sector credibility, and speed of response, while maintaining a strategic partnership with it.

Why this hybrid works

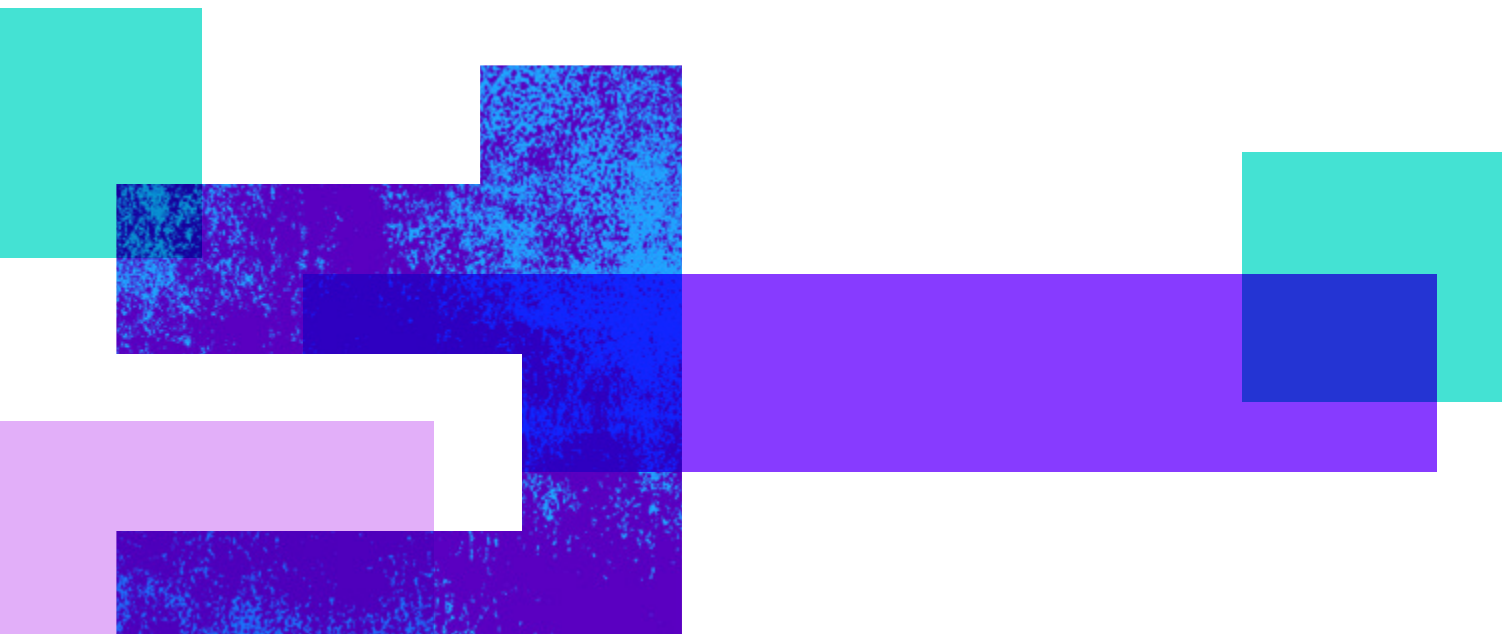
This hybrid structure addresses the urgency felt in the music sector by recognising its scale and immediate need, while maintaining political balance by not excluding other art forms. It prevents dilution by giving music appropriate scale while phasing other sectors in strategically, and builds scalable infrastructure by designing governance and systems for expansion from the start. It also protects Scottish identity by avoiding subsumption into a UK-wide model and positioning Scotland as a distinct international cultural actor.

Risks and mitigations

The main risk is a perception of music dominance, which would be addressed through a clear phased expansion plan; duplication with existing bodies, addressed through formal memoranda of understanding and commissioning agreements; bureaucratic drift, addressed through lean staffing and commercial KPIs; sector tension, addressed through transparent governance and advisory panels; and funding fragility, addressed through a multi-year settlement and a co-investment strategy.

Phased implementation

In years one and two, the priority would be to establish the core and the music division, pilot the touring fund, and formalise international partnerships. In years three to five, the service would expand to one or two additional sectors, increase recoupment-based investments, and launch a formal diaspora network. From year five onward, the aim is a fully operational, multi-sector export service with a sustainable funding mix and an established international reputation.



Comparative assessment of options



7. Comparative assessment of options

7.1 Option appraisal framework

To enable a consistent, like-for-like comparison between the four potential models, each option was assessed against a common set of criteria derived from:

- Stakeholder evidence gathered through the survey, consultation groups and interviews.
- Objectives within Scotland’s International Culture Strategy 2024–30.
- Lessons from international comparator systems.
- Practical considerations relating to delivery, governance and public investment.

These criteria are applied consistently across the sections that follow – strategic fit, deliverability, cost and scalability, sector impact, and risks and dependencies – so the options can be compared on a like-for-like basis before considering the research team’s preferred direction in Section 9.

7.2 Summary comparison

Model	Core idea	Structural weight	Funding level	Strength	Risk	RAG
Commissioning Core	Small expert-led commissioning body within network	Medium	£4–6m	Strategic clarity and co-ordination	May feel abstract or indirect	Amber
Global Culture Platform	System-level alignment (digital, treaties, diaspora, hubs)	High	£8–10m	Long-term structural shift	Complex coordination; slow burn	Red
Export Accelerator	Risk-sharing, deal facilitation, capability building	Lean–Medium	£4–6m	Practical, friction-removal, agile	Less symbolic impact	Green
Cross-Sector Hybrid (Music-First Phase)	Music division inside broader service	Medium–High	£6–7m+	Immediate scale & ROI	Perceived sector imbalance	Amber

RAG rating reflects the overall delivery and reputational risk profile of each model at this stage of development (Green = lower risk; Amber = moderate risk requiring active management; Red = higher risk requiring strong mitigation).

7.3 Strategic fit

All four models are strategically coherent with the objectives of Scotland's International Culture Strategy 2024–30. They each address the core failings of the current ecosystem: fragmentation; slow funding response; lack of sector expertise; and inequitable access. The models differ, however, in how directly they align to each of the strategy's three aims.

The Global Culture Platform Model offers the strongest long-term strategic alignment, embedding cultural export within a broader architecture of digital infrastructure, diaspora networks, treaty-enabled co-production, and city-based cultural hubs. However, its complexity and timescale make it less immediately actionable. The Cross-Sector Hybrid Model (Music-First Phase) aligns well with both the economic growth and sector sustainability dimensions of the strategy, while the Commissioning Core and Accelerator models are best suited to addressing the practical and structural barriers that are most immediately constraining the sector. All four models can accommodate the strategy's commitment to equitable access, though this will require explicit design choices within whichever model is selected rather than emerging organically from the structure itself.

7.4 Deliverability

The Commissioning Core Model and the Accelerator Model are the most immediately deliverable. Both require a relatively small new structure, can be built around or alongside existing bodies, and could be operationally active within 12 to 18 months of a funding decision. The Cross-Sector Hybrid Model requires more institutional design work and a larger funding commitment, but its phased approach provides a realistic pathway to full operation – a credible music division could be functioning within 18 months, with the broader service architecture developing over the subsequent two to three years.

The Global Culture Platform Model is the least immediately deliverable. It requires significant inter-agency co-ordination, new digital infrastructure, and a level of government commitment that would need to be confirmed before the model could progress beyond the design stage. It is best understood as a long-term systemic ambition rather than a near-term deliverable, though elements of it – particularly the Strategic Export Unit and the Cultural Export Council – could be established as foundations for later development.

A key deliverability factor across all models is the availability of appropriately skilled personnel. The specialist expertise required – in international cultural markets, IP and rights, co-production, and sector-specific export pathways – is relatively scarce. Recruitment timelines and talent availability should be factored into implementation planning from the outset.



7.5 Cost and scalability

The four models span a funding range of approximately £4–10 million per annum at full operation. At the lower end, the Commissioning Core and Accelerator models can deliver meaningful impact at a scale that is commensurate with Scotland's current public funding environment. The Cross-Sector Hybrid Model sits in the mid-range at £6–7 million, while the Global Culture Platform Model requires the highest investment at £8–10 million but distributes much of this across existing budget lines rather than requiring it as new central expenditure.

All four models include mechanisms for co-investment, recoupment, and matched funding that would reduce the net public cost over time. The Accelerator Model, in particular, is structured to shift support from subsidy toward risk mitigation and co-investment, building longer-term financial sustainability into its operating model. The Cross-Sector Hybrid Model's ringfenced touring fund is designed for phased scaling, moving from an initial pilot of £500,000 toward a long-term target of £2–3 million as impact is demonstrated.

The comparator evidence is relevant here. Culture Ireland operates at approximately €8 million per annum, serving a population of around five million. Sounds Australia – a music-only service – operates at A\$1.16 million over four years while supporting 2,000 artists internationally. Creative Export Canada operates at CA\$11 million over three years across all creative sectors. Scotland's population, cultural sector scale, and existing infrastructure suggest that a service in the £5–7 million range would represent a credible and proportionate investment for a full multi-art-form service at maturity.

7.6 Sector impact

The models differ significantly in their immediate sector reach and in how they distribute benefit across the breadth of Scotland's creative sector.

The Cross-Sector Hybrid Model (Music-First Phase) will deliver the most immediate and concentrated impact within the music sector, and is the model most directly responsive to the urgent and well-evidenced need articulated by music sector stakeholders throughout the consultation. The risk is perceived sector imbalance – other art forms may feel de-prioritised in the early phases – though the phased expansion architecture is designed to manage this.

The Commissioning Core and Accelerator models are inherently cross-sector in their design and can engage all art forms from the outset, though depth of sector-specific expertise will depend on how specialist advisers or commissioned partners are deployed. Both models are well suited to serving the hybrid creative and commercial sectors – games, publishing, craft, design – that consistently fall between existing support bodies.

The Global Culture Platform Model has the widest potential sector impact over time, but its impact in the short term will be felt primarily in sectors with the infrastructure to engage with digital platforms, co-production frameworks, and city-based hub activity – screen, visual arts, literature, and festivals. Its benefits for individual practitioners and smaller organisations are likely to be less immediately tangible.

Whichever model is chosen, equitable access for emerging practitioners, micro-organisations, and those working outside the Central Belt will need to be explicitly designed in. The research evidence consistently shows that these groups face the greatest barriers and receive the least benefit from existing provision. A service that serves only those already capable of accessing international markets will not address the structural inequity that the sector has identified.

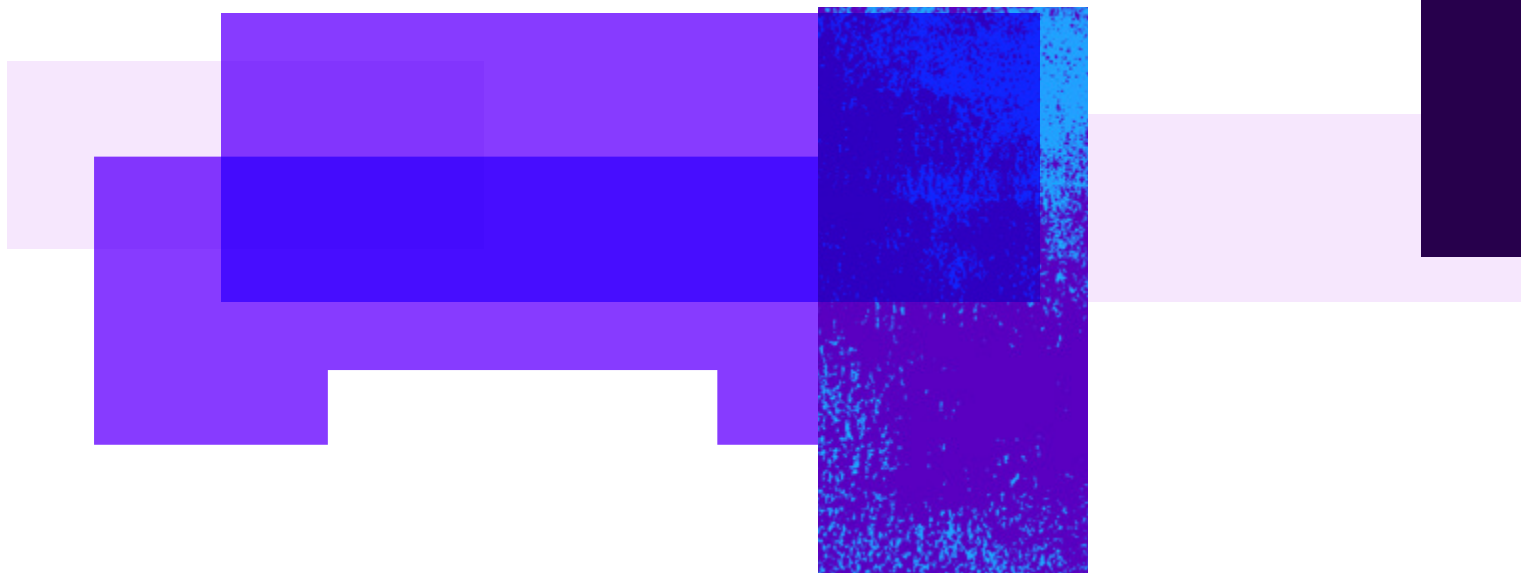
7.7 Risks and dependencies

All four models carry risks, and honest assessment of these is important to avoid the strategic over-optimism that has undermined some comparator services. Key risks common to all models include: recruitment of sufficiently specialist staff; the risk of bureaucratic drift, particularly if governance

structures are too heavily weighted toward public sector accountability frameworks; duplication with existing bodies and associated territorial friction; and the risk that initial funding commitments are not maintained, leaving a service stranded at sub-critical scale.

Model-specific risks are as follows. The Commissioning Core Model risks being perceived as abstract or indirect, particularly if its commissioning function is not backed by a sufficiently visible and resourced central fund. The Global Culture Platform Model's primary risk is co-ordination failure – the inter-agency architecture requires sustained political will and genuine collaborative commitment from bodies with established territorial instincts. The Accelerator Model risks insufficient symbolic impact in the early phases, as its friction-removal and risk-mitigation functions are less visible than direct grants or touring funds. The Cross-Sector Hybrid Model risks entrenching sector imbalance if the phased expansion plan is not honoured or resourced in subsequent years.

Key dependencies across all models include: a multi-year funding settlement, without which no model can develop the international relationships that effective cultural export requires; meaningful formal agreements with Creative Scotland, SDI, British Council Scotland, and sector bodies to avoid duplication, maximise opportunities for co-investment, and ensure co-ordinated delivery; and a co-design process with the sector before implementation, to ensure that the service's design reflects operational realities rather than policy assumptions.



Decision

summary



8. Decision summary

This section draws together the recommendation, rationale, costs, and delivery approach set out across this report.

8.1 Recommended option

The research team recommends that the Scottish Government proceed with the Cross-Sector Hybrid Model (Music-First Phase), set out in full in Section 6.4: a national Scottish Cultural Export Service (SCES), established from the outset as a cross-sector body, with a fully resourced Music Export Division as its first and largest operational strand, and a phased pathway to bring further sectors into dedicated provision from year two. Where government appetite or available funding makes a full new body difficult to establish in the near term, the Commissioning Core Model, set out in Section 6.1, is recommended as the credible lower-cost alternative and viable first phase.

8.2 Why this option

Four objective, evidence-based criteria informed this recommendation, applied consistently across all four options considered in Section 7: demonstrated export readiness and scale; the strength of existing specialist infrastructure to build on; the urgency created by the pace at which international opportunity currently arises; and the extent to which comparator countries' experience supports the approach. Music scores most strongly against all four criteria, and its evidence base (set out in Sections 2, 3 and 6) is the most immediate and quantifiable in this report.

To be clear, this is not a recommendation for a music-only service. The Cross-Sector Hybrid Model should be structured from day one as a cross-sector body, and its central strategic functions such as market intelligence, international relations, Brand Scotland positioning, and cultural diplomacy, described in Section 6.4.2, should be available to all sectors from year one, not only to music. A structured co-design process (Section 9.3) will bring practitioners from across art forms into the detailed design of both the Music Export Division and the sequencing plan for subsequent sectors, and the design principles in Section 5.2, including equity of access and protection of Scotland's cultural brand and identity, apply to the Service as a whole, not to music alone. The phased structure exists specifically to prevent the dilution of limited funding across all art forms at once, which the evidence in this report indicates would risk delivering meaningful support to none.

8.3 Rejected alternatives

Three alternative structural models were considered in detail and are set out in full in Section 6. The Global Culture Platform Model, a system-wide architecture linking digital infrastructure, treaties, diaspora networks, and city hubs, was assessed as the most ambitious and strategically comprehensive option, but also the least deliverable in the near term, requiring extensive inter-agency co-ordination and a longer lead time before impact would be felt (Section 7.4). The Cultural Export Accelerator Model, a lean, market-facing risk-sharing and capability-building service, was assessed as commercially agile and genuinely cross-sector from the outset, but was considered less able to deliver the scale of immediate impact that stakeholder evidence shows is most urgently needed in music (Section 7.6). The Commissioning Core Model, a small commissioning and brokerage body, was assessed as deliverable and lower cost, and remains the recommended alternative if a full new body is not feasible at this stage. It was not selected as the primary recommendation because its lighter-touch structure is less well suited to the scale of dedicated support the evidence shows music specifically requires.

8.4 Costs

Model	Estimated annual cost (full operation)	Notes
Cross-Sector Hybrid Model (recommended)	£6–7 million	50–60% Music Export Division; 15–20% central core; 15–20% emerging sector pilots; 5–10% international partnerships
Commissioning Core Model (alternative)	£4–6 million	Lower institutional footprint; viable first phase
Cultural Export Accelerator Model	£4–6 million	Not recommended as primary option; considered in Section 6.3
Global Culture Platform Model	£8–10 million	Not recommended as primary option; considered in Section 6.2

These figures are indicative. As set out in Section 9.4, a full business case for the chosen model will require detailed financial modelling of staffing costs, fund sizes, co-investment structures, and projected returns. Costs would build progressively rather than arrive as a single funding request: an initial pilot phase, including a ringfenced £500,000 onward touring fund for music, is proposed within existing or interim budgets ahead of a full multi-year settlement (Section 9.3).

8.5 Delivery timetable

Phase	Timing	Key milestones
Immediate	0–6 months	Decision in principle; funding commitment; co-design process launched; funding line rationalisation agreed
Phase 1	Years 1–2	Central core and Music Export Division established; touring fund piloted; international partnerships formalised
Phase 2	Years 3–5	Expansion to one or two additional sectors; recoupment-based investment increased; formal diaspora network launched
Phase 3	Year 5+	Fully operational multi-sector service; sustainable funding mix; established international reputation

A visual roadmap setting out this timetable in graphic form would be a natural early output of the co-design process in Section 9.3, once the preferred option is confirmed.

8.6 Governance proposal

The Service would be established as an independent national body at arm's length from government, led by a Chief Executive accountable to a board that combines industry specialists from music and across sectors, Creative Scotland representation, trade and enterprise representation, cultural diplomacy expertise, major funders such as PRS, and an independent chair (Section 6.4.2). The board would in turn be accountable to Scottish Government and British Council Scotland for strategic performance and value for money, against a clear performance framework aligned to economic growth, international engagement, cultural diplomacy, and sector sustainability. The Service would deliberately sit outside Creative Scotland's direct structure, in order to preserve commercial agility, sector credibility, and speed of response, while maintaining a formal strategic partnership with it and with SDI to avoid duplication (Section 9.3).

8.7 Success measures

Success would be measured against the impact framework set out in Section 9.4, combining early-stage delivery reporting with longitudinal impact gathering, mapping, and case studies. In practice, this means tracking export conversion rates, touring losses avoided, IP retention, international co-productions, and the sustainability of creative careers (Section 6.3), alongside equity of access for emerging practitioners, organisations outside the Central Belt, and practitioners working in traditional, Gaelic, and heritage arts (Section 9.4). For the Music Export Division specifically, early indicators would include the volume and value of international opportunities supported through the touring fund and the pace of decision-making achieved, addressing directly the funding delays identified as a core barrier throughout this report.



Conclusions and next steps



9. Conclusions and next steps

9.1 Summary of findings

This scoping study finds that a dedicated Scottish Cultural Export Service is both necessary and justified. The demand from the sector is unambiguous, the case is supported by consistent evidence across all research methods, and the international comparator evidence demonstrates that well-designed export infrastructure delivers measurable results. Scotland is currently operating without the provision that many comparator nations take for granted.

The research identifies ten key themes across all stakeholder engagement formats: fragmentation and lack of co-ordination; Brexit and Covid as structural disruptions; inequity of access and opportunity; funding inadequacy and misalignment; the gap between creative and commercial support; the importance of people and relationships; the need for investment in domestic talent; the need for increased digital engagement; diverging views on service structure; and tensions between sustainability goals and export ambition. These themes are mutually reinforcing: they describe ten dimensions of a single structural deficit.

The five priorities identified from the stakeholder evidence – a clear centralised point of access, redesigned funding mechanisms, bridging the creative-commercial gap, equitable access for emerging practitioners, and formalising the relational infrastructure – should be treated as non-negotiable design requirements for any future service, regardless of which structural model is chosen.

The four models set out in Section 6 represent quite different choices. They are not ranked in order of preference within this section: the assessment in Section 7 provides the criteria against which decision-makers should weigh them. What the research does make clear is that any model chosen must be adequately funded, appropriately governed, built with genuine sector expertise, and designed from the outset for multi-year operation rather than annual cycle dependency.

9.2 Preferred direction(s) for further development

The research team's assessment, based on the full evidence gathered through this study, is that a phased implementation model offers the strongest balance of ambition, deliverability and affordability for Scotland at this stage. Under this approach, a Scottish Cultural Export Service would be established from the outset as a cross-sector body, with music serving as the first fully developed specialist division – the Cross-Sector Hybrid Model (Music-First Phase) set out in Section 6.4. The rationale is as follows: music has the most clearly evidenced, immediate, and scalable export need; the sector has an existing infrastructure of practitioners, industry bodies, and international contacts on which a dedicated division can build; establishing the Service as cross-sector from day one, rather than as a music service that later expands, protects political and sector-wide legitimacy from the outset; the phased structure protects against dilution while creating a principled and transparent pathway to full multi-sector provision; and the Music Export Division provides a credible proof-of-concept that can build government and public confidence in the broader service over time.

This recommendation is made with awareness of the equity, sector-hierarchy, and resource-concentration concerns raised elsewhere in this report (Sections 3.5.1.3, 5.2, and 7.7). As set out in Section 6.4, music's position as the first fully developed division rests on four objective criteria: export readiness and scale, existing specialist infrastructure, the urgency of current funding gaps, and comparator precedent – rather than on sector preference, and the Service's central strategic functions are available to all sectors from year one, not only once Phase 2 sectors are added. A visual delivery roadmap, expanding on the timetable set out in Section 8.5, would be a natural early output of the co-design process described below.

Where government appetite or available funding makes a full new body difficult to establish in the near term, the **Commissioning Core Model** is the recommended alternative. It is lean, actionable, and strategically coherent – and it can be built at a scale that is credible within current funding constraints. It should be designed with scalability in mind, so that it can grow into a fuller service as evidence of impact accumulates and political commitment develops.

Both preferred directions should be developed through a structured co-design process with the sector before any final governance or operational decisions are made. The sector has demonstrated its willingness to engage, its knowledge of what is needed, and its awareness of what has not worked elsewhere. A service designed in consultation with practitioners and organisations – rather than for them – is substantially more likely to succeed. Both directions could usefully be framed as three-year pilots, with a formal review point in year three to inform any expansion or adjustment in year four.



9.3 Immediate actions

The following actions are recommended for the period immediately following the publication of this report.

- 1. Decision in principle.** The Scottish Government should confirm a decision in principle on whether to proceed with establishing a Scottish Cultural Export Service and, if so, which structural direction to pursue. This decision should be communicated to the sector promptly to maintain confidence and momentum.
- 2. Funding commitment.** A multi-year funding commitment, even at pilot scale, should be confirmed before any co-design

or implementation work begins. Annual funding uncertainty is incompatible with building the international relationships a service of this kind requires.

- 3. Co-design process.** A structured but time-limited co-design process should be established with sector representatives from across art forms, career stages, and geographic contexts. This process should result in an agreed operational design brief for the chosen model within six months.
- 4. Agency alignment.** Formal conversations should begin promptly with Creative Scotland, SDI, Scottish Enterprise, British Council Scotland, and relevant sector bodies to agree respective remits, avoid duplication, and identify opportunities for commissioning and co-investment relationships with a future service.

- 5. Fast-response funding pilot.** As an interim measure pending the establishment of a full service, a small fast-response fund for time-sensitive international opportunities – with a turnaround time of five to ten working days – should be established within Creative Scotland or a nominated body. This would immediately address the most urgent and consistently cited funding gap.
- 6. Funding line rationalisation.** Alongside agency alignment, this process should identify which existing, narrower funding lines, such as ad hoc touring pilots and parallel international showcase support currently spread across multiple bodies, would be consolidated into the new service rather than continued in parallel, so that launch does not simply add a further layer of activity but replaces fragmented provision with a single, better-resourced route.

9.4 Further work required

This scoping study has provided a foundation of evidence for a decision on a Scottish Cultural Export Service. It has not been designed to answer all the questions that implementation will raise. The following areas require further work before or alongside implementation.

Detailed financial modelling. The funding estimates provided in Section 6 are indicative. A full business case for the chosen model will require detailed financial modelling of staffing costs, operating costs, fund sizes, co-investment structures, and projected economic returns.

Governance design. The legal status, board composition, accountability framework, and relationship to existing bodies all require detailed design work. Governance decisions will significantly affect the service's ability to operate at commercial speed and with the sector credibility it will need.

Equity and inclusion framework. The specific design mechanisms required to ensure equitable access for emerging practitioners, organisations outside the Central Belt, and practitioners working in traditional, Gaelic, and heritage arts need to be developed in detail, informed by engagement with those communities.

Sustainability and climate framework. The tension between international cultural ambition and Scotland's climate commitments requires a principled and practical framework rather than a general aspiration. This should be developed as part of the service's operational design, drawing on emerging best practice in sustainable touring and digital engagement. This work should be carried out carefully, so that new environmental or logistical requirements do not create barriers that negatively impact equality, diversity and inclusion aims.

Impact measurement framework. Clear metrics and evaluation processes should be agreed before the service launches. These should capture economic contribution, career development outcomes, equity of access, and qualitative impact on Scotland's international cultural reputation – not simply grant volumes or number of events supported. Measurement should combine early-stage reporting with longitudinal impact gathering, mapping and case studies, to capture outcomes that only become visible over time.

Expanded sector engagement. This scoping study engaged broadly but not exhaustively. Several sectors – heritage, traditional arts, Gaelic arts, and socially engaged practice – were represented in the survey and focus groups but would benefit from deeper engagement during any co-design process. The geographic distribution of engagement was also weighted toward the Central Belt and should be actively counterbalanced in subsequent work.

Appendix A:

Survey questions

The survey was designed so specific questions would arise in response to answer selection, for example with questions tailored to organisational framing for those who indicated they were responding on behalf of an organisation. As such, the full list of questions may look like there are repetitions, whereas in practice only one of a set of questions was displayed.

About You and Your Work in Culture

2. In what capacity are you responding to this survey?*

☐ As an individual

☐ On behalf of an organisation or business

3. Which sector(s) do you primarily work in? Please select all that apply.*

☐ Music

☐ Performing Arts

☐ Visual Arts

☐ Screen / Digital / Games

☐ Literature / Publishing

☐ Festivals

☐ Heritage / Museums

☐ Traditional Arts / Gaelic Arts

☐ Creative Industries (Design, Fashion, Architecture, etc.)

☐ Cross-sector / Interdisciplinary (Please describe)

4. Which best describes you? *

☐ Individual Practitioner / Freelancer

☐ Agent / Promoter

☐ Cultural Organisation

☐ Public Body or Agency

☐ Funder

☐ Government / Arm's-Length Body

☐ Other (Please Specify)

5. How would you describe the size of your organisation or business?*

☐ Micro

☐ Small

☐ Medium

☐ Large

☐ Uncertain / Does Not Apply

6. What is the nature of your role?*

☐ Artistic / Creative

☐ Producing / Touring

☐ Strategic / Leadership

☐ Export / International Development

☐ Policy / Funding

☐ Other (Please Describe)

7. Where is your organisation primarily based? *

☐ Aberdeen

☐ Aberdeenshire

☐ Angus

☐ Argyll and Bute Council

☐ Clackmannanshire

☐ Comhairle nan Eilean Siar

☐ Dumfries & Galloway

☐ Dundee

☐ East Ayrshire

☐ East Dunbartonshire

☐ East Lothian

☐ East Renfrewshire

☐ Edinburgh

☐ Falkirk

☐ Fife

☐ Glasgow

☐ Highland

☐ Inverclyde

☐ Midlothian

- ☐ Moray
- ☐ North Ayrshire
- ☐ North Lanarkshire
- ☐ Orkney
- ☐ Perth & Kinross
- ☐ Renfrewshire
- ☐ Scottish Borders
- ☐ Shetland
- ☐ South Ayrshire
- ☐ South Lanarkshire
- ☐ Stirling
- ☐ West Dunbartonshire
- ☐ West Lothian
- ☐ England
- ☐ Northern Ireland
- ☐ Wales
- ☐ International

8. Where are you primarily based?

*

- ☐ Aberdeen
- ☐ Aberdeenshire
- ☐ Angus
- ☐ Argyll and Bute Council
- ☐ Clackmannanshire
- ☐ Comhairle nan Eilean Siar
- ☐ Dumfries & Galloway
- ☐ Dundee
- ☐ East Ayrshire
- ☐ East Dunbartonshire
- ☐ East Lothian
- ☐ East Renfrewshire
- ☐ Edinburgh
- ☐ Falkirk
- ☐ Fife

- ☐ Glasgow
- ☐ Highland
- ☐ Inverclyde
- ☐ Midlothian
- ☐ Moray
- ☐ North Ayrshire
- ☐ North Lanarkshire
- ☐ Orkney
- ☐ Perth & Kinross
- ☐ Renfrewshire
- ☐ Scottish Borders
- ☐ Shetland
- ☐ South Ayrshire
- ☐ South Lanarkshire
- ☐ Stirling
- ☐ West Dunbartonshire
- ☐ West Lothian
- ☐ England
- ☐ Northern Ireland
- ☐ Wales
- ☐ International

Current Export Activity and Experience

13. Has your organisation engaged in international activity in the last 5 years? *

- ☐ Yes – regularly
☐ Yes – occasionally
☐ No – but we would like to
☐ No – and we do not plan to

14. As part of your creative and/or cultural work, have you engaged in international activity in the last 5 years? *

- ☐ Yes – regularly
☐ Yes – occasionally
☐ No – but I would like to
☐ No – and I do not plan to

15. Which regions have you worked in? Please select all that apply.*

- ☐ Europe
☐ Asia
☐ Africa
☐ Middle East and North Africa
☐ Australasia
☐ North America
☐ South America
☐ Global / Online

16. Which regions has your organisation worked in? Please select all that apply.*

- ☐ Europe
☐ North America
☐ South America
☐ Asia
☐ Africa
☐ Middle East and North Africa
☐ Australasia
☐ Global / Online

17. What forms have these activities taken? Please select all that apply.*

- ☐ Touring / Showcasing
☐ Commissions or Co-Commissions
☐ Market Attendance
☐ Residencies
☐ Trade Missions
☐ Digital Export
☐ Other (Please Describe)

18. What forms have your activities taken? Please select all that apply.*

- ☐ Touring / Showcasing
☐ Commissions or Co-Commissions
☐ Market Attendance
☐ Residencies
☐ Trade Missions
☐ Digital Export
☐ Other (Please Describe)

19. How were your activities supported? Please select all that apply.*

- ☐ Self-Funded
☐ Project Grants (Scottish / UK)
☐ International Partners
☐ British Council
☐ Commercial Income
☐ Philanthropy
☐ Commercial / Bank Loan or Similar
☐ Other (Please Describe)

20. How were these activities supported? Please select all that apply.*

- ☐ Self-Funded
☐ Project Grants (Scottish / UK)
☐ International Partners
☐ British Council
☐ Commercial Income
☐ Philanthropy
☐ Commercial / Bank Loan or Similar
☐ Other (Please Describe)

Barriers and Constraints

21. What are the main barriers to developing cultural export activity that you encounter? Please select all that apply.*

- ☐ Lack of Finance
☐ Lack of Market Intelligence
☐ Limited International Networks
☐ Risk and Cash-Flow
☐ Scale or Capacity
☐ Skills / Knowledge Gaps
☐ Visas / Immigration
☐ Logistics and Freight
☐ Legal / Tax / IP Issues
☐ Language / Cultural Barriers
☐ Time / Staffing Constraints
☐ Other (Please Describe)

22. Are there specific developments or ambitions in your work that are currently held back by the absence of clearer export pathways?*

- ☐ Yes
☐ No

23. What would clearer export pathways change for your work?

Existing Cultural Export Support Landscape

24. What existing export-related support do you currently access? Please select all that apply. *

- ☐ Creative Scotland
- ☐ British Council
- ☐ Scottish Government / Agencies
- ☐ UK Government / Agencies
- ☐ Local Authority Support
- ☐ Trade Bodies
- ☐ International Networks
- ☐ Informal / Peer Networks
- ☐ Membership of International Bodies / Networks
- ☐ None

25. To what extent do current funding structures support sustained international development rather than one-off projects? *

- ☐ Very well
- ☐ Adequately
- ☐ Poorly
- ☐ Not at all
- ☐ Unsure
- ☐ I am not aware of such funding support

26. To what extent is the current export support landscape easy to navigate? *

- ☐ Very easy
- ☐ Adequately easy
- ☐ Not very easy
- ☐ Not at all easy
- ☐ Unsure
- ☐ I am not aware of any export support landscape

27. Where do you see duplication, gaps, or inconsistencies in the export support landscape?

28. Are you aware of any existing cultural export models or services? *

- ☐ Yes
- ☐ No

29. Please list any existing cultural export models or services that you are aware of.

The Case for a Scottish Cultural Export Service

30. How useful would a Scottish Cultural Export Service be? *

- ☐ Very useful
- ☐ Somewhat useful
- ☐ Not very useful
- ☐ Not at all useful
- ☐ Unsure

31. Why might a Scottish Cultural Export Service not be useful? *

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32. Why might a Scottish Cultural Export Service be useful? *

0/32,000 characters

33. What problems should a Scottish Cultural Export Service primarily address? Please select all that apply. *

- ☐ Strategic Coordination
- ☐ Market Intelligence
- ☐ Relationship-Building
- ☐ Capacity Building
- ☐ Access to Finance
- ☐ International Promotion
- ☐ Advocacy and Influence
- ☐ Long-Term Career Pathways
- ☐ Other (Please Describe)

34. What functions should a Scottish Cultural Export Service perform? Please select all that apply.*

- ☐ Market Research and Intelligence
- ☐ Brokerage and Introductions
- ☐ Producer / Exporter Development
- ☐ Skills and Training
- ☐ Touring and Co-Production Support
- ☐ Export Readiness Programmes
- ☐ Digital Export Support
- ☐ Policy Coordination
- ☐ Soft-Power and Cultural Relations Activity
- ☐ Artform Expertise
- ☐ Other (Please Describe)

35. In your view, which operational model would be most effective for a Scottish Cultural Export Service?*

- ☐ A new standalone organisation
- ☐ A function within an existing body
- ☐ A distributed network model
- ☐ A hybrid model
- ☐ Unsure
- ☐ Other (Please Describe)

36. Please rate the following statements on a scale of 1-5:*

A cultural export service should be arm's-length from government.

- ☐ 1 (Strongly Disagree)
- ☐ 2 (Disagree)
- ☐ 3 (Neutral/Unsure)
- ☐ 4 (Agree)
- ☐ 5 (Strongly Agree)

A cultural export service should align closely with national policy.

- ☐ 1 (Strongly Disagree)
- ☐ 2 (Disagree)
- ☐ 3 (Neutral/Unsure)
- ☐ 4 (Agree)
- ☐ 5 (Strongly Agree)

A cultural export service should be sector-led.

- ☐ 1 (Strongly Disagree)
- ☐ 2 (Disagree)
- ☐ 3 (Neutral/Unsure)
- ☐ 4 (Agree)
- ☐ 5 (Strongly Agree)

A cultural export service should be internationally embedded.

- ☐ 1 (Strongly Disagree)
- ☐ 2 (Disagree)
- ☐ 3 (Neutral/Unsure)
- ☐ 4 (Agree)
- ☐ 5 (Strongly Agree)

A cultural export service should relate to domestic cultural development.

- ☐ 1 (Strongly Disagree)
- ☐ 2 (Disagree)
- ☐ 3 (Neutral/Unsure)
- ☐ 4 (Agree)
- ☐ 5 (Strongly Agree)

A cultural export service should relate to economic development and trade.

- ☐ 1 (Strongly Disagree)
- ☐ 2 (Disagree)
- ☐ 3 (Neutral/Unsure)
- ☐ 4 (Agree)
- ☐ 5 (Strongly Agree)

A cultural export service should relate to international relations and diplomacy.

- ☐ 1 (Strongly Disagree)
- ☐ 2 (Disagree)
- ☐ 3 (Neutral/Unsure)
- ☐ 4 (Agree)
- ☐ 5 (Strongly Agree)

37. What lessons might a Scottish Cultural Export Service take from other existing cultural export models or services?

0/12,800 characters

38. How might a Scottish Cultural Export Service best support under-represented and/or disadvantaged groups? This might include, but is not limited to, freelancers and micro-organisations, rural and island communities, Gaelic and minority language cultures, D/disabled artists, and/or early-career practitioners.

0/12,800 characters

39. What would success look like for a Scottish Cultural Export Service in 5-10 years?

0/12,800 characters

40. Finally, is there anything further relating to cultural export you would like share?

0/12,800 characters

Appendix B:

References

and sources

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Image Credits

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Confessions of a Shinagawa Monkey

Vanishing Point Theatre and Kanagawa Arts Theatre

Photographer: Mihaela Bodlovic

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Craft Scotland-COLLECT – London – 2024 – Photography by Iona Wolff

p. 4

Pavilion Theatre. Photography: Gaelle BERI

p.5

Compass Curators 2026 visit to V&A East Storehouse, V&A East Storehouse, 2026. Craft Scotland.

Featuring the Compass Curators 2026 cohort: Elizabeth Ann Day, Kate Pickering, Scott Smith and Laura Wilson, with Programme Leader Katy West and Craft Scotland Learning Manager Ilaria Casini. Courtesy of Craft Scotland. Photography: Kate Livingstone.

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Sing Sistah Sing! Tales of Transatlantic Freedom (2022), Pianodrome, Edinburgh Fringe.

Photo: David Monteith-Hodge

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Photography: Iona Wolff

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Made in Scotland Showcase 2026. Photo: Neil Hanna.

p. 19

Photography: Grant Anderson

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Pippa Blundell, Made in Scotland performances, 2025. Photography: Jannica Honey.

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Tether, Citizens Theatre, 2026

Wonder Fools / Theatre SAN. Featuring Naomi Stirrat and Nami Woo. Photography: Ruari Barber Fleming. International collaboration between Wonder Fools and Theatre SAN, with preview performances ahead of the Edinburgh Festival Fringe.

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Ray by Meytal Blanaru, Fuori Programma Festival, Rome, Italy, July 2025. Scottish Dance Theatre.

Performers: Massimo Monticelli and Pauline Torzuoli. Photography: Giuseppe Follacchio.

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Cara Rose, Made in Scotland performances, 2025. Photography: Jannica Honey.

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FLOCK / MOVING CLOUD, 2024. Tiu Makkonen

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Commonwealth Poet Laureate Residency during the Glasgow 2026 Commonwealth Games, Edinburgh and Glasgow, 2026. Scottish Poetry Library. Featuring Peter Mackay, Scotland's Makar, and Selina Tusitala Marsh, Commonwealth Poet Laureate, pictured beside the Robert Fergusson statue on Edinburgh's Royal Mile. Image credit: Scottish Poetry Library.

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Craft Scotland and Jorum Studio – London Craft Week 2026 – The Shape of Scent – Juli Bolaños-Durman – Photography by Fraser Scott

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Katie Gregson Macleod at the Barony Hall, 16 January 2026. Photography: Gaelle BERI.

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Image credit: Neil Hanna

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KuleeAngee, Made in Scotland performances, 2025. Photography: Jannica Honey.

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Rokia Koné at St Luke's, 16 January 2026. Photography: Gaelle BERI.

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Moving Cloud. Photography: Brian Hartley

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Towa Mura rehearsals and preview performances, Theatre Royal Dumfries and CatStrand, New Galloway, Scotland, 2026. Photography: Kim Ayres.

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Grace Morton at Òran Mór, 23 January 2026. Photography: Gaelle BERI.

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The Game of Life. Photography: Brian Hartley

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Tether 인연, Summerhall, 2025. Wonder Fools / Theatre SAN. Featuring Molly Bryson and Hyeon-kyu Choi. Photography: Eoin Carey. Graphic design: Orlando Lloyd. Poster image for Edinburgh Fringe 2026, originally photographed during a work-in-progress performance at Summerhall in 2025.

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Antigone, Interrupted by Joan Clevillé, 2020. Scottish Dance Theatre. Performer: Solène Weinachter. Photography: Maria Falconer.

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Ayoub Sisters & BBC SSO at City Halls, 23 January 2026. Photography: Gaelle BERI.

Appendix C:

Desk research and detailed case studies

Desk research:

Existing policy frameworks in Scotland:

Inspiring connections: Scotland's International Culture Strategy 2024–30

This report is the first of its kind in Scotland and was formed after public consultations with the cultural sector to develop an international cultural strategy for Scotland based on the areas of economic impact, environment, and well-being as well as international reputation. It recognises cultural exports as a fast-growing sector accounting for 4.7 per cent of overall Scottish exports in 2020. In terms of determining cultural exports, the strategy recognises a diversity of outputs with no single definition such as touring and exhibiting. As well as the economic and reputational benefits of cultural exports, its importance in creative development and connections is also highlighted. Challenges to cultural exports include Brexit and the Covid-19 pandemic and the cost-of-living crisis. Brexit has meant practical challenges in terms of visa applications from artists as well as exclusion from Creative Europe and Erasmus+. Another challenge is climate change, as Scotland's creative sector has a commitment to achieving net zero, yet international collaborations require travels overseas. Another feature mentioned in international exchange is how artistic collaborations are essential in Scotland's journey of recognising its colonial past. The report also acknowledges despite existing support there is a gap in a dedicated service to cultural exports in Scotland and that Scotland can draw from other models globally in the creation of its own model.

The Scottish Government (2023) International Culture Strategy: Consultation analysis

This report outlines the research of a survey completed by 77 artists professionals in Scotland in response to adopting an international cultural strategy. The respondents' experience in cultural exports included 'collaborative projects with international peers, knowledge exchange, outbound work (e.g. touring), inbound work (e.g. tourism and hosting international visitors), involvement in international societies and partnerships, commissioning work and practitioners, sponsorship/funding and campaigning'(p.3).

Some of the motivations and benefits of working internationally include networking and building connections and partnerships, research and knowledge exchange, attracting international visitors and engagement, profile raising, reputation and creating future opportunities and financial reward.

Barriers to international exchange were identified as Brexit, the pandemic, the cost of living and precarious funding landscape as well as lack of time, capacity, expertise and lack of support pathways. Mutual exchange, mobility, connections and opportunities were aimed at the participants selected for a future strategy as well as health, well-being, social inclusion, education and empowerment. Some participants felt the branding of 'Scotland's' distinctive identity may fail to acknowledge the diversity

of contemporary Scotland. Respondents sought public support for international activities, highlighting how this support is vital for international activities. EDI concerns were raised when it came to bringing work to a country whose government may violate human rights, as well as high costs meaning access to travel was limited. Some respondents were sceptical about how a strategy would operate in practice; how it would be measured and assessed over time. The following countries were mentioned as examples of supporting international cultural activity as a gold standard.

These case studies include:

- Quebec's Art Council (Canada)
- Goethe Institute (Germany)
- German Academic Exchange Service (DAAD)
- Pro Helvetia (Switzerland)
- Fluxus Art Projects (France)
- Office for Contemporary Art Norway
- Kone Foundation (Finland)
- Frame (Finland)
- The Finnish Institute
- Nordic Culture Point
- Network of European Museum Organisations (NEMO)
- Arts Council of Wales
- Culture Ireland
- Creative Europe
- Korea Arts Management Service (KAMS)
- HEVA – Finance for East Africa's Creative Economy
- Sounds Australia
- Creative New Zealand.

A Culture Strategy for Scotland: Action Plan 2023

Published in December 2023, the Culture Strategy Action Plan provides a series of workstreams that collectively aim to provide a roadmap to a strong and resilient culture sector and support a cultural landscape where everyone benefits and gets to take part. It builds on the original Culture Strategy for Scotland published in 2020, which was centred around three key themes of strengthening, transforming and empowering culture in Scotland.

The former Minister for Culture, Europe and International Development Christina McKelvie begins the report by reflecting on the value the cultural sector brings to the country's financial and social well-being. The action plan focuses on the following themes.

1) Resilience 2) Strengthening Culture 3) Transforming through Culture 4) Empowering through Culture.

While the actions are primarily focused on Scotland, an international cultural strategy as discussed above is mentioned in the thread 'strengthening culture' when it comes to developing new audiences and accessing new markets abroad.

A Culture Strategy for Scotland 2020:

Despite this strategy being slightly outdated, it is still a useful document to contextualise the more recent *Inspiring Connections*. This document refers to culture as one of Scotland's greatest exports. It emphasises culture's value in Scotland's international reputation and for soft power. It also points to the need for cultural mobility to ensure Scottish artists and skills nurtured at home has a global platform and embraces diversity of artists, and states UK immigration policy should facilitate rather than hinder this cross-cultural collaboration. Creative industries are lauded as positively contributing to Scotland's brand globally and boosting the economy, with cultural exports rapidly growing by 27.8 per cent between 2019–20. The development of international networks is central to strengthening both the export performance and global reputation of Scotland's creative industries. The Scottish Government's *A Trading Nation: A Plan for Growing Scotland's Exports* (2019) recognises the significant contribution that culture makes to forging and sustaining twinning relationships with towns, cities and regions worldwide. The strategy also commits to scaling the GlobalScot network from 600 to 2,000 business contacts across key markets, and to leveraging broader international connections, including diaspora communities and alumni networks, as vehicles for economic and cultural engagement. The Scottish Government intends to support Gaelic culture abroad. The government states they are committed to international festivals and touring, supporting the International Touring Fund and loans from the National Collection as well as Expo. Overall, it pinpoints the benefits and values of cultural exports and international cultural exchange but lacks a clear pathway or framework to support these ambitions going forward.

Creative Industries Federation/Oxford Economics (2020) *The Projected Economic Impact of COVID-19 on the UK Creative Industries*. London: Creative Industries Federation

Published in June 2020 and drawing on a survey of over 2,000 creative organisations and freelancers alongside Oxford Economics modelling, this report provided the first comprehensive projection of the pandemic's financial impact on the UK creative industries. The creative industries were projected to suffer a combined £74 billion turnover loss over 2020 compared to 2019: a decline of 30 per cent, translating into a GVA shortfall of £29 billion, or 25 per cent below 2019 levels. The greatest drop was expected in Q2, with only modest recovery projected across Q3 and Q4. In total, 406,000 creative industry jobs were considered at risk in 2020, comprising a projected 119,000 drop in employment among employees – despite the Coronavirus Job Retention Scheme and a further 287,000 job losses among the self-employed. Freelance workers bore the earliest impact: more than one in three respondents reported having had all their freelance contracts terminated by the end of Q1 2020.

Geographically, over half of the projected GVA shortfall – £14.6 billion – was concentrated in London, with Scotland the hardest hit in relative terms, facing a projected 39 per cent drop in creative GVA in 2020, with Scottish respondents the most pessimistic of any region in the survey. Scotland was projected to lose £1.7 billion in creative GVA and around 14,900 jobs. The report also warned that regions making greater use of the furlough scheme including Scotland, the North East and East Midlands were likely to face the severest consequences once the Job Retention Scheme was withdrawn.

The Arts Council 2016: *The arts and culture contents sector and exit from the European Union*

This survey, which was conducted after the Brexit referendum, surveys 1,000 artists and cultural organisations to identify the implications of the UK's exit from the EU on their industry and work. Some of the concerns raised include funding opportunities, mobility, legal and regulatory frameworks and trade. Funding concerns were centred around Creative Europe funding but also university opportunities, as skilled graduates are essential to the cultural sector. In terms of mobility, fear around funding and administrative burdens were also mentioned. The regulatory frameworks of copyright law as well as VAT were identified as potential future barriers for the sector. Cultural exports remained a concern as Europe is one of UK's largest recipients of cultural exports. Additionally, the potential impact mobility could have on the diversity of the creative workforce was raised as a potential issue. Respondents also identified the importance of international collaboration for artistic development and that a deficit of this international dialogue could lead to less artistic risk taking and a reduction in quality of work.

Fisher, R. (2021) *Some Implications for Culture in England Post-Brexit: A Brief Intro to the Issues*. Compendium Webinar, 4 November 2021. London: International Intelligence on Culture / Goldsmiths, University of London. Available at: https://www.culturalpolicies.net/wp-content/uploads/2021/11/Brexitwebinar-Oct2021_RodFisher.pdf (Accessed: 27 May 2026).

Delivered as a briefing paper for the Compendium of Cultural Policies and Trends webinar in November 2021, Rod Fisher's presentation draws together evidence from a range of policy reports and sector surveys to map the main consequences of Brexit for England's cultural and creative sector. Fisher argues that the cultural sector appeared to be a blind spot for the UK Government, with many warnings going unheeded, and that the Government consistently underestimated the extent to which the cultural and creative sector depended on creators and workers from the EU. The workforce implications are substantial: before Brexit, EU citizens represented 8 per cent of the UK classical music workforce, 15 per cent of larger museum staff, 20 per cent of the dance sector, and almost 30 per cent of Royal Opera House employees, with restrictions on cultural workers from the EU likely to result

in a skills gap that could take a generation to replace, particularly given the concurrent squeeze on arts subjects in English school education. Cambridge Econometrics predicted that 27,000 creative jobs could be lost in London alone.

The report also highlights the significant damage to international cultural exchange and the creative economy's export capacity. Arts Council England data indicated that 17 per cent of earned income of theatre companies and 16 per cent of dance companies was generated by international activity, much of it from engagement with EU countries. The loss of the single EU carnet means that touring theatre companies, music ensembles and film and television productions face significant delays and costs at each internal border when bringing sets, instruments and equipment into the EU. Between 2007 and 2016, 1,385 projects in the arts, museums and creative sector received at least £345 million from EU cultural programmes, and a further 12.2 million euros were invested through the MEDIA sub-programme of Creative Europe in the UK audiovisual sector in 2018 alone, with no indication that the Government planned to replace Creative Europe funding. Fisher concludes that these combined pressures on the workforce, on touring, on EU funding access, and on copyright and social security frameworks represent a structural and lasting challenge for England's cultural sector and its international standing.

British Council Scotland & Creative Scotland (2022). *To See Ourselves: Cultural Assets and Attributes of Scotland*. Researched by Creative Services (Scotland) Ltd and Queen Margaret University. British Council Scotland. https://scotland.britishcouncil.org/sites/default/files/to_see_ourselves.pdf

The report is presented in two sections: 'To see Ourselves' and 'How Others see us' and involves interviews with strategic leaders across Scotland's creative industries, as well as surveys with both international and Scottish arts professionals. The section 'To see Ourselves' speaks of Scotland's international reputation and the value of this as a cultural asset, in particular the international collaborations and exchange at festivals and delegate events as well as highlighting the challenges of Brexit and Covid and the need to balance the desire for internationalism with supporting home-grown talent at home. The findings also pointed to a perception of internationalism as an 'export issue', taking Scottish cultural products to, rather than from, other countries, which is attributed to the current Scottish funding system.

International case studies: Further details

Country: Ireland

Culture Ireland/Cultúr Éireann

Founded in 2005, and existing within the government remit of the Department of Culture, Communications and Sport, Culture Ireland is a body that promotes and advances Irish culture internationally and supports Irish artists to gain access to international opportunities. According to the Global Ireland 2025, Culture Ireland has created up to 260 full-time jobs for Irish artists abroad through their funding and support, which included grant schemes as well as support to regular funded bodies in Ireland abroad and showcase opportunities. Its mission is stated as: 'Culture Ireland promotes Irish arts worldwide. In creating and supporting opportunities for Irish artists across the island of Ireland, Culture Ireland aims to ensure that Ireland's cultural excellence is enjoyed by international audiences.' Their strategic aims are to create opportunities for partnerships abroad for Irish artists, platform and present Irish work as well as ensure Irish work has a global audience.

Budget funding: Approx eight million euros from the Irish Government budget according to 2025 Culture Ireland Report – this is its highest budget in 20 years.

How they do this/systems in place:

Regular Grant Scheme: This scheme provides funding for artists/artist organisations presenting work at international venues. The funding covers artists' travel and subsistence but excludes the artist's fee. Criteria define artwork as under the Art Act 2003 as encompassing a wide range of creative outputs. Criteria is inclusive of the funded artists performing publicly and excludes research and development opportunities as well as residencies, competitions and amateur events.

Showcase Scheme: This scheme supports Irish artists to present their work to industry professionals and delegates including programmers and presenters at international showcases. The strategic aims of the scheme are:

- Exposure for Irish artists abroad for potential opportunities and to promote Irish talent abroad.
- Mentorship and networking.
- To showcase Irish high-quality and new and emerging work on a global stage.
- To advance promotional materials for Irish artists.

Culture Ireland partners with arts organisations all over the world for showcases such as Worldwide Music Expo (WOMEX). See the 2026 calendar of future partnerships here: <https://www.cultureireland.ie/funding/showcase/>

See/Hear Scheme:

This scheme is designed to invite international delegates to see artists at festivals and expos in Ireland to create exposure and future potential collaborations for touring. It welcomes programmers, curators and presenters to see Irish work in the island of Ireland.

Annually funded bodies:

- Irish Arts Center New York
- Literature Ireland
- First Music Contact Ireland
- [Centre Culturel Irlandais](#), Paris
- Irish Film Institute, Ireland.

Expert advisory committee: The expert advisory committee is appointed by the Minister of Tourism, Sports and Culture and ensures Culture Ireland reaches its strategic goals as well as helping with grant decisions.

Country: New Zealand

The New Zealand Government recently launched a new cultural policy strategy called *Amplify*. Its vision is to 'Amplify our arts and culture to make New Zealand a creative powerhouse with global reach.' The three strands of the policy are: Investment for Maximum Impact; Nurturing Talent; and Reducing Barriers. There is a strong emphasis on cultural export growth, and this is further detailed in their CDIP (Cultural Diplomacy International Programme) 2026–2029. The Minister of Arts, Culture and Heritage is accountable for the implementation of this programme, along with a steering group which will report to the Minister and liaise with industry professionals to advise promoting overseas cultural work and help funnel funding.

Consultations carried out with over 700 practitioners in 2024 highlighted concerns over the overly commodified language of culture, undervaluing its other societal benefits and, with its focus on exports, further concerns were raised about community culture and honouring the Te Tiriti o Waitangi

and ngā toi Māori – an agreement with the Maori people over the ownership and valuing of their cultural goods and heritage. There was also scepticism over funding and, at times, vagueness in their roadmap.

Perhaps the most established cultural export system is who prioritises international work through funding, resources for artists including legal advice as well as providing opportunities to attend global music markets such as South by Southwest and BIGSOUND, Australia.

Onward Sound:

This initiative provides funding (50 per cent contribution towards costs) for artists to take their music to a global audience. Composers, bands, and producers can apply at different stages of their careers, and it includes all genres. Within the five funding grounds, there are two streams: the Business Development Grant (up to \$5,000 – i.e. projects up to the value of \$10,000) and this covers a visit abroad to markets to network and connect with other industry professionals; and the International Market Development Grant (up to \$50,000 projects up to the value of \$100,000). This covers a variety of costs from touring, marketing performing, showcasing and flights, visas and accommodation. These applicants are required to submit an international market and business plan when applying.

Onward Sound also provides smaller grants for delegates to attend music markets abroad.

Creative New Zealand:

Creative New Zealand is a crown entity (arms-length public organisation) governed by the Arts Council and in New Zealand's national organisation for arts support and advocacy. They support cultural exports through multiple avenues – namely through funding, cultural exchange and residencies.

According to the We Create Report: 'New Zealand's creative exports were estimated by United Nations Trade and Development (UNCTAD) to be over US\$2.5 billion (NZ\$4.1 billion) in 2022. This would rank the sector as our fifth largest export earner that year.'

International Presenters Fund:

This is a co-investment fund that offers up to \$50,000 for international presenters (promoters, venues, arts festivals and curators). New Zealand presenters cannot apply for the fund. It is inclusive of all art forms and covers. Since 2025, \$304,383 has been delivered to 11 projects from the fund.

Residencies: Berlin Visual Arts Residency and Banff Centre Indigenous Arts Residencies

The Berlin Visual Arts bursary provides a New Zealand artist to live and create in Berlin for up to one year, inclusive of studio reaccommodation and living costs. Whilst the Banff residencies offer Māori artists indigenous residencies in Canada.

Country: Norway

Non-EU still connected to EU cultural funding:

Although not part of the EU, Norway still has access to Creative Europe funding due to being part of the European Economic Area which enables international cultural collaborations with European partners.

Norwegian Arts Abroad (NAA):

Founded in 2016, NAA is a collective network of multiple arts organisations representing a variety of cultural sectors (Office of Contemporary Art Norway (OCA), Music Norway, Performing Arts Hub Norway (PAHN), Norwegian Crafts, DOGA, Norwegian Film Institute (NFI) and Norwegian Literature Abroad (NORLA) who promote Norwegian Arts Abroad. These organisations collaborate 'collectively addressing common issues, achieving common goals and creating meaningful synergy' (New Voices from Norway, 2022). The NAA operates as sector-specific advisors to the Ministry of Foreign Affairs, issuing grants

and export initiatives on the ministry's behalf. In 2022, NAA launched the cross-cultural competency programme, which involved seven teams including an artist and agency from each sector of NAA who were coached and supported by industry experts on how to export their art or project abroad while also gaining network experience at professional events and funding.

Norwegian Literature Abroad (NORLA):

Supports Norwegian literature abroad mainly through translation of books for international markets as well as promotion of Sami literature.

Performing Arts Hub Norway (PAHN):

Promotes contemporary arts abroad through travel grants for international performances and touring and mobility schemes through delegation trips abroad.

Office for Contemporary Arts Norway:

Provides international residencies as well as grant schemes for participation at art fairs and international visitor schemes to host art critics, writers, researchers, curators or press in Norway in the government's initiative to further professionalise the NAA programme.

Music Norway:

Norway's dedicated music export office provides trade missions and industry networking at music festivals in Norway through a delegation programme and bespoke advice, and information on international markets, export strategies, marketing, management and stakeholder relationships.

Norwegian Craft:

Their aim is to promote contemporary Norwegian arts internationally and collaboration abroad, by advising consulates and embassies abroad on Norwegian crafts as well as support through grant and networking initiatives, residencies and theory development.

DOGA The Norwegian Centre for Design and Architecture:

Promotes design and architecture through awards, knowledge sharing and grants.

Norwegian Film Institute:

Although not part of the EU, Norway still has access to Creative Europe funding due to being part of the European Economic Area, which enables international cultural collaborations with European partners. This is applicable to film funding under the MEDIA strand of Creative Europe.

Country: Korea

Hallyu, the Korean cultural 'Wave':

Hallyu refers to the rapid growth of South Korean culture globally. It has been attributed to the organised and mass cultural exports of Korea abroad, and has become synonymous with 'K', the national branding of South Korea. Hallyu was a 'success without a plan' (Jungsoo Kim, 2016) that developed after the abolition of censorship and rise of creative freedom especially in the fields of music K pop and film K drama and K film. Cultural policy trends (Lee, 2019) have referred to Korea as a patron state of the arts, funding it but not controlling it – but rather a state that is supporting strategy that has led to it becoming a global cultural powerhouse.

Arts markets: PAMS – Performing Arts Market in Seoul:

Funded by the Ministry of Culture, Sports and Tourism and Arts Council Korea, this performing arts market is celebrating its 20th year. In a jam-packed programme offering showcases, pitching and networking opportunities, it is a global showground of international collaboration.

KOFICE: The Korea Cultural Exchange Agency:

KOFICE is run by the Korean Minister of Culture, Sports and Tourism. Its primary aim is to establish: 'A network hub connecting Korea and the world through culture'. They work towards achieving this aim through an array of activities such as:

- Cultural exchange events, such as Kore•A•Round Culture: Supporting inbound and outbound cultural exchanges through a detailed programme of hosting collaborations with nine countries including Scotland.
- Research and professional development.
- International networking opportunities.
- Consulting: Offering a service that streamlines resources and expertise from multiple arts organisations to provide bespoke advice on international collaborations across different art forms.
- **K-arts on the GO initiative:** This supports travel and accommodation costs for Korean artists to take their work overseas when invited to exhibit or perform. The work must be invited from one of the organisations on their website's platform directory, which contains over 700 artistic platforms from 71 countries globally.
- **Touring K-Arts:** Supports and advances the international touring of artists in collaboration with the 42 Korean Cultural Centres globally.

KOCCA: The Korean Creative Content Agency:

KOCCA was founded in 2009 as a government agency that merged the National Broadcasting Institute, Gaming Agency and Culture and Content Agency. Today, its main mission is to globalise Korean cultural content, in particular: K-pop, K-dramas, animation, gaming and fashion and to make Korea a global cultural powerhouse. Lee (2019) has referred to it as having an 'industrial policy approach through delivering cultural policy' through distribution, marketing and export systems, and market exchange and showcasing, often acting as an intermediary between the Korean government and the international community. Cultural exports have become a key part of the Korean economy, with the creative industries making up \$30 billion in exports in 2023 and is a fast-growing market. KOCCA collaborates with KOFICE in order to promote cultural collaboration across the world through events such as:

- KCON
- Character Licensing Fair
- K-Content Expo
- Knock (content pitching platform)
- StartupCon
- K-EXPO
- Korean Popular Culture and Arts Awards
- Content IP Biz-Fair
- Games Level Up Showcase.

ARKO – Arts Council Korea:

The arts council supports cultural exports and exchange through a variety of initiatives spanning a breadth of art forms:

- The Co-Matching Fund
- Research Trip
- 10th World Summit on Arts and Culture, Seoul 2025
- Venice Biennale Korean Pavilion
- International Artists-in-Residency
- International Engagement & Networking
- Creation & Production
- ARKO Next Global Stage
- ARKO Inbound International Exchange & Networking

Cultural centres:

There are 30 Korean culture centres globally run by the Ministry of Culture, Sports and Tourism. The function of these centres is to advocate and promote Korean culture abroad as well as exercise the role of cultural diplomacy through fostering international collaborations.

Country: Wales

Wales Arts International:

This is a body that is part of the Arts Council of Wales whose focus is connecting Welsh artists to the world. Its mission is to support 'fair and planet-conscious' international collaboration with its values rooted in sustainability.

Arts Infopoint UK is an initiative led by Wales Arts International in collaboration with Arts Council England, Creative Scotland, and Arts Council Northern Ireland. It is a service that provides free advice and resources for artist mobility to and from the UK as part of the On the Move network.

International Strategy Framework 2024–2034:

This recent ten-year strategy for Arts Council of Wales and delivered by Wales Arts International is focused on connecting Wales's international artistic, creative, and cultural potential with the world, 'ensuring fairness to people and the planet'. The aim of the strategy is threefold: to support Welsh artists through international engagement; use arts for cultural diplomacy and international relations; and support diverse communities and diaspora engaging in international work to focus on not just Welsh presence abroad but international presence in Wales. The strategy is rooted in the 'Chwarae Teg' (fair play) Principle. This commitment to fairness emerges from The Well-being of Future Generations (Wales) Act 2015 and gives the same legislative weight to cultural well-being as to environmental, social, and economic well-being – the first of its kind in the world. This places a duty on all public bodies in Wales to consider cultural commitment alongside other sustainability goals.

International Opportunities Fund: This fund supports Welsh artists to present their work, collaborate in a partnership or attend a networking event outwith Wales and the UK. Total funding of £235,000 was available in 2025–26, with applications capped at a limit of £7,500 for international collaboration and presentation to £5,000 for residencies. This fund is linked to the well-being objectives of the International Wales strategy that prioritises fairness to people and the planet.

Creative Wales: This is a Welsh government agency that is distinct from the arts council: its focus is more commercialised in the industries of film, TV and gaming. It supports international exports as well as attracting international work to Wales through its funding initiatives.

Country: Northern Ireland

Northern Ireland does not have a dedicated export system, nor does it have an international cultural strategy. Rather through partnerships with the UK as well as the Republic of Ireland, it navigates their cultural exports through collaborations as well as a vibrant festival scene in Belfast such as the Book festival, Outburst, and International Arts festival to name but a few, attracting delegates from across the globe. As well as this, the Spotlight on Northern Ireland at the Edinburgh Festival Fringe supported by British Council Northern Ireland and The National Lottery through the Arts Council of Northern Ireland showcases quality theatre and dance from Northern Ireland leading to potential international touring and networking opportunities. Another partnership between British Council and the Arts Council of Northern Ireland is through the **National Lottery Artists' International Development Fund Support for Individual Artists Programme (SIAP)**.

This is fund offered by the Arts Council of Northern Ireland and co-funded by the British Council. This fund is open to artists and arts organisations across varying stages of their career across all art forms to boost their international reputation. The fund offers up to £7,000.

Cross-border collaboration is prevalent due to the Shared Island Initiative between Northern Ireland and the Republic of Ireland. Many share all-island organisations such as Visual Arts and the Heritage Council, while new initiatives like the Shared Island Touring Scheme 2026 support creative collaboration through a touring fund between the two. Also, Northern Irish artists may apply for Culture Ireland grants as it is a whole island initiative.

The Four Nation's International Fund:

This fund supports creative collaboration between England, Scotland, Wales and Northern Ireland to connect with international cultural partners. The fund is delivered in partnership by Arts Council England, Arts Council of Northern Ireland, Arts Council of Wales/Wales Arts International and Creative Scotland, with Creative Scotland administering the fund on behalf of all partners. Here are available funds ranging from £1,000–5,000, supporting a variety of artistic partnerships either in-person, digital or hybrid and ranging from residencies to exchanges and co-creation networking. This fund has emerged in light of the challenges to international collaboration including Brexit, Covid-19 and the climate crisis. In terms of eligibility, it must be a UK applicant with an international partner.

Country: Canada

CEC – Creative Export Canada and Creative Export Strategy:

Creative Export Canada is a government-run system that is a programme run by Creative Export Strategy with a budget of up to £11 million over three years (2024–2026) to fund cultural exports. The Creative Export Strategy supports creative industries on the global stage through funding opportunities, networking opportunities, and providing information and business support. The strategy supports a variety of art forms ranging from craft, performing arts, music, visual art, publishing, design and digital media.

Funding: The Creative Export has two streams.

- **Export Ready Stream:** The first stream is for 'export-ready projects', with funding available for up to \$2.5 million. This is a highly competitive funding with a limited number of projects funded annually. The funding is for organisations including profit and not-for-profit and eligibility states that there must be a minimum of one full-time employee.

- **Export Development Stream:** The second is for development projects with available funds of up to \$4 million. It is targeted at new or early career exporters. Eligibility criteria is similar to the first except the income of the applicant is expected to be lower than the export ready stream.

Creative Expert Navigator Service: This service consists of advisors who provide advice to mainly early-stage exporters in navigating creative exports, from information on government initiatives and grants to research on international markets.

Trade Missions: Trade missions support export-ready creative businesses networks, collaborate and meet the international market at events globally, from the Edinburgh Fringe to jazzahead! Germany to name some past missions. 2026 will see a delegation go to Mexico.

Global Affairs Canada Trade Commissioner Service: The Trade Commissioner Service supports Canadian businesses to trade with the rest of the world through resources, and export offices in key markets helping to promote internationalisation and solve any business issues that arise.

Cultural Property Export and Import Act: This act states which objects, ranging from artwork to instruments to fossils, require a permit to leave Canada in a highly regulated system around cultural property.

Canada's creative export model gives explicit consideration to the needs and rights of indigenous artists and producers. Published by the Department of Canadian Heritage under Canada's Creative Export Strategy, *Doing Business with Indigenous Creative Industries in Canada* (2024) was developed in direct response to feedback from indigenous creative entrepreneurs, who expressed frustration at the lack of cultural understanding and sensitivity demonstrated by international buyers during export-related business interactions. Co-produced with an indigenous advisory panel, the guide provides practical and ethical guidance for prospective international partners engaging with Canada's indigenous creative industries.

On identity, the report advises international partners to identify and use the correct Nation when engaging with artists, to ask for assistance with pronunciation where needed, and to resist homogenising First Nations, Métis and Inuit peoples. Canada's indigenous population spans over 70 languages and encompasses a vast diversity of cultures, customs and practices. Indigenous art should not be assumed to be exclusively heritage or traditional in form: it is as diverse as the people who create it, and includes a wide range of contemporary practice across all disciplines and genres.

Respect for cultural protocols is central to the guide's recommendations. There are contexts in which photography, alcohol, or certain forms of documentation are inappropriate, and partners are expected to learn and observe these. Sovereignty over creative and cultural property is a key principle – indigenous creators expect meaningful control over their intellectual property, their storytelling, and how their work is represented in marketing and promotion. The report warns strongly against cultural appropriation, commodification and tokenisation, noting that indigenous knowledge has historically been exploited in media and commerce, and that unique intellectual property considerations apply that differ from standard copyright frameworks.

Community sits at the heart of indigenous business practice. Relationships are relational rather than transactional, and gift-giving, respect for elders, and the process of introduction carry genuine significance. International partners should not rely on artists to provide cultural education: this detracts from creative practice, and partners are expected to undertake their own research. Communication norms may differ from Western business convention: deep listening, humour as resilience, and the absence of direct eye contact are meaningful rather than signs of disengagement. Punctuality is understood differently, as care for community may take precedence, and decision-making frequently requires broader community consultation and therefore more time.

In terms of practical business conduct, partners should allow time for ritual and spiritual practice at events – including smudging and blessings, and rider agreements may include requests for alcohol-free environments. Contracts should incorporate cultural considerations and use appropriate language in all promotional materials. Grant application deadlines must be factored into booking timelines, and longer approval processes should be anticipated throughout.

On international export specifically, certain products present logistical challenges at borders – seal skin, for example, is subject to import restrictions in some countries due to biosecurity concerns around parasites and requires additional documentation and advance planning. Broader practical considerations include the cost of international travel and visas, which may require additional financial support, and the fact that some community members and elders may not hold bank accounts, necessitating flexible payment arrangements. Many indigenous communities are also remote, with limited internet access, meaning that in-person meetings are often preferred and more effective than digital alternatives.

Canada Council for the Arts:

- Provided £18.4 million in funding for arts abroad: 304 arts organisations as well as 720 artists have been funded through Arts Abroad.

Arts Across Canada and Abroad aims to facilitate national and international cultural exchange and presentation of Canadian work.

Grants:

Circulation and Touring Grant: Provides funding for Canadian artists to tour in and outwith Canada for international exposure and networking – it excludes self-presenting work requiring an overseas partner.

Representation and promotion: Up to \$30,000 is available per application to cover the cost of travel for Canadian artists/organisations presenting work abroad. This fund is also available for international organisations looking to present Canadian work and Canadian organisations that attract international arts buyers to Canada.

International translation: \$20,000 is available for translation and \$2,000 for promotion of literary or dramatic works for international presentation and publication.

Foreign artists tours: Up to \$50,000 is available for Canadian arts organisations to bring international artists to Canadian audiences.

Residencies: International residencies can apply for up to \$20,000, which includes creative research as well as creation and networking opportunities.

International co-productions: Up to a \$50,000 grant is available for presentation of a work in Canada in collaboration with an international arts partner at a festival or biennale.

Festivals and presenters: Multi-year funding is available for Canadian arts organisations to present work (can include international collaborators) to festival audiences in Canada.

Country: Australia

Creative Australia: (Formerly Australia Council):

International Engagement Strategy 2021–2025:

The aims of the strategy are two-fold:

- ‘To strengthen the global profile of Australian arts, culture and creativity.’
- ‘To build the capability of Australia’s artists, creative workers and organisations to engage internationally, beyond physical travel.’

The strategy also strives for ‘borderless’ collaboration and enhancing technology for international exchange as well as prioritising first nationals work and bolstering relationships with Asian neighbours as well as a focus on risk-taking quality, access and sustainability.

International Engagement Fund:

This fund is available up to \$30,000 and is open to a variety of disciplines excluding contemporary music. The purpose is to fund international collaboration with a partner on a knowledge exchange, lab or development project that is mutually beneficial and can cover artists’ fees as well as travel visa and access costs.

International Travel Fund:

Up to \$20,000 is available for funding, which must be for development and includes fairs, markets festivals, and biennales but it excludes presenting work and is solely for promotional purposes.

Music Australia:

Music Australia is a body of Creative Australia whose function is to support and promote contemporary music at home and in international markets. Music has become one of Australia’s fastest growing cultural exports according to the research 2025 report ‘The Bass Line: Charting the economic contribution of Australia’s music industry’. The report acknowledges the complexities of measuring the value of music exports but surmises it was around \$975 million to the Australian music industry revenue in 2023–24.

Music Australia supports international exports through the following mechanisms:

Music Australia Export Development Fund:

This development fund between the Australian government and music industry provides a matched funding initiative for artists, from emerging to established, to export their music overseas.

- **International Performance and Touring Activity:** Grants range from \$5,000–75,000 in matched funding. This grant supports a headline or support tour, festival, biennale or showcase. It can also extend to travel, visa, accommodation and access and childcare costs.
- **International Professional and Artistic Development:** Up to \$15,000 is available in matched funding for professional development such as residencies, Bandcamp, writing retreats, overseas recordings, trade fairs, conferences, delivering lectures abroad and meetings abroad. It can extend to other necessary travel costs as aforementioned visas, flights, etc.
- **International Market and Audience Development:** \$2,000-10,000 in matched funding is available for content creation and promotional activity such as PR or social media campaigns, music videos, radio broadcasting and translation.

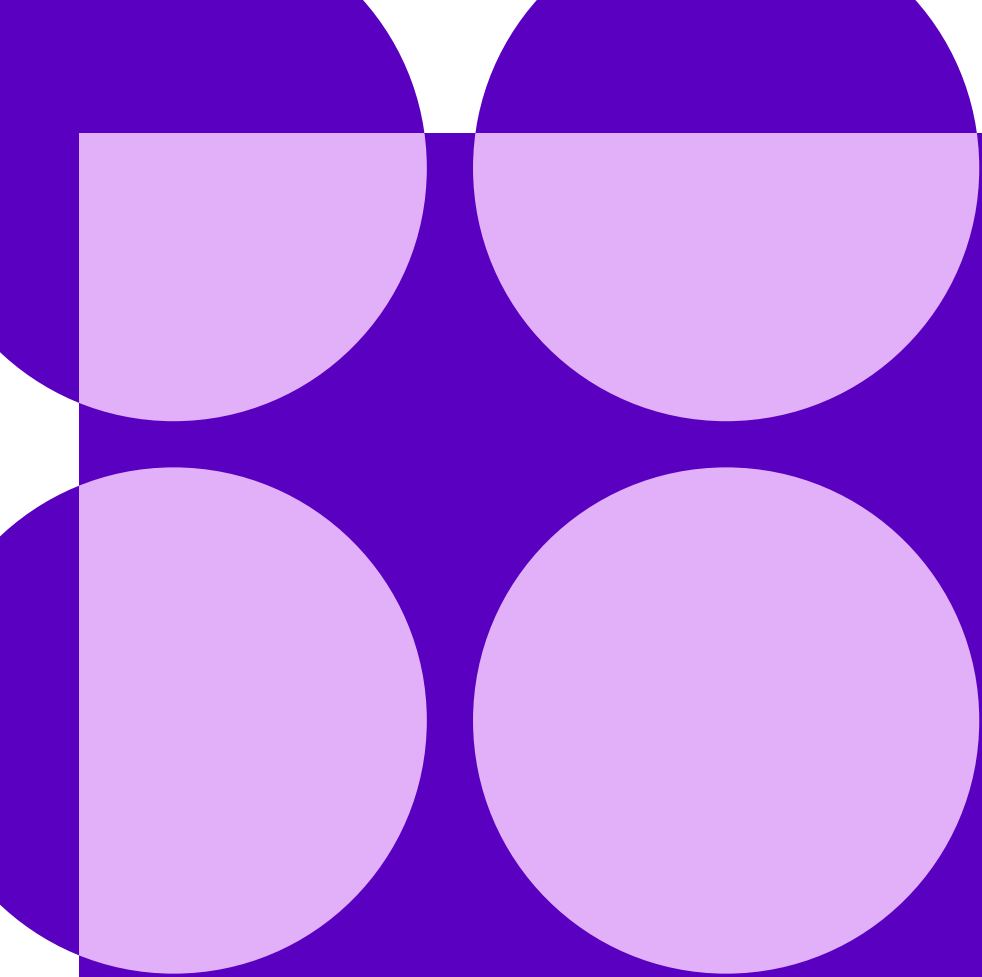
Sounds Australia:

This is Australia's dedicated music export office, founded in 2009 and funded by the Government and industry partners. Its goal is to increase contemporary music exports. It achieves this goal through a variety of strategic activity – it is not a funding body and provides support in the following way, propelling 2,000 artists overseas since it was created.

- **International performance opportunities:** Support artists decide if they are export ready, create showcases based around Australian artists who have been programmed by the showcase Sounds Australia's do not provide this. Unlike festivals that are for the public, showcases offer a highly professionalised environment for business opportunities.
- **Networking:** Opportunities to build connections with partners overseas whether at conferences, festivals, or showcasing events from jazzahead! to South by Southwest. There was a focus to enter the US market in particular, and advocacy for simpler visa routes for artists.
- **Advice:** Provide guidance and advice for artists in all career stages on markets, how and when to export as well as their strategies and opportunities, and practical advice on visas, carnets, insurance and tax.
- **Inbound opportunities:** Invite international delegates to Australia to see musicians perform on their home soil.

BIGSOUND Australia:

Funded by the Queensland government and produced by Qmusic, this is a giant three-day networking and showcase opportunity for export-ready musicians in Australia, leading to international markets and opportunities, and delegates consists of other artists, industry professionals, bookers and producers.



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