

International export potential of the UK Museums and Galleries Sub-sector

A study for UKTI

August 2009



CONTENTS

1. INTRODUCTION	3
2. UKTI AND THE MUSEUMS SECTOR	5
3. SUMMARY OF RESEARCH FINDINGS	7
4. RECOMMENDATIONS FOR INITIAL INTERVENTIONS BY UKTI	21
APPENDIX 1 Interviews conducted as part of this research	27
APPENDIX 2 Other research resources	39
APPENDIX 3 Examples of H.E. Museum studies	40
APPENDIX 4 Programmes offered by FE colleges	42
APPENDIX 5 Spanish Research Report	44

1. INTRODUCTION

In 2008, the Department for Culture, Media and Sport (DCMS) working in partnership with the Department for Business, Enterprise and Regulatory Reform (BERR) laid out an ambitious agenda for supporting *'creativity from the grass-roots to the global stage'*, one which recognises the creative industries as one of Britain's distinctive strengths as well as a significant component of the economy and a key driver of regeneration.

The twenty-six commitments of *Creative Britain: New Talents for the New Economy*, range from actions relating to embedding creativity within all levels of education, developing the skills needed by employers and creating career pathways in order to widen participation in the industries, to assisting creative businesses, fostering innovation and enhancing the role which major arts institutions play within their local and regional communities. These factors and the new models by which the Strategy will achieve its aims will contribute to, Britain's *'unique position to become the world's creative hub'*.

'As the challenges of competition have increased, the concept of the UK acting as an international creative hub has become increasingly attractive. This would mean our being a leading international cluster of the many aspects of the creative economy, maintaining world-class standards and operating as a creative broker. The challenge now is to define this role more clearly, and to help our creative businesses and the institutions and programmes which support them, to make it a reality'.
(*Creative Britain: New Talents for the New Economy*)

As a key element in achieving this: *'UK Trade & Investment will lead a five-year strategy to enhance the international competitive position of the UK's creative industries. The strategy will promote our reputation as an innovative, dynamic springboard to global growth.'*

The role of the museums and galleries sub-sector in promoting Britain's international reputation for creativity is strongly acknowledged within the Strategy, and perhaps one of their most distinctive strengths is the capacity for cutting-edge innovation, and for re-defining the conventional relationships between audiences and venues.

This study was commissioned by UKTI to identify ways in which UKTI can **work with the museums and galleries sub-sector to increase exports and to extend partnership and dialogue with international peers, in order to lay the foundation for future sales of goods and services.**

The report focuses on business-to-business relationships between UK and overseas museums and galleries as well on international **opportunities for UK education and training providers which offer products and services that are appropriate to this sub-sector.** It seeks to highlight key issues and to detail the proposed steps

to building an exports strategy and it will be supplemented by further discussion around specific points of interest to UKTI and plans for dissemination.

The core of the study was a series of interviews with representatives of national museums, universities, colleges, umbrella bodies and a sample of overseas museums (see Appendix 1).

Although the research has identified a number of strategies by which UKTI could promote international activity in the sector, the need for further consultation with various potential stake-holders in order to ensure an optimum working relationship, is evident and the report includes some specific action points within the 'Recommendations' section.

Finally it should be noted that although this research was commissioned before the full impact of the global economic downturn was apparent, the interviews took place after that fact. Therefore, the recommendations take account of the 'economic realities' in which the sector is operating.

2. UKTI AND THE MUSEUMS SECTOR

In spite of the fact that the interviews revealed a low level of engagement with the UKTI, the response to requests for interviews was good and the interviewees were positive and constructive in their reflections on the international market and the future role of the UKTI. Currently UKTI is not perceived as a resource by interviewees and those who had viewed the UKTI web site felt it to be too general for this sector. In fact many interviewees still think of the team as the DTI.

It should be noted that further education colleges have benefited from UKTI's services both in-country and via TVET UK (www.tvetuk.org). However only one of the colleges interviewed is currently a member of TVET UK and none had received any specific support in relation to their cultural heritage related offer. One college suggested that it would be important for UKTI to engage with the new National Skills Academy (NSA) for Creative and Cultural Skills and to help secure overseas business relating to (for example) the 'export' of collaborative (employer/training provider) models as well as the service offer of individual organisations.

The interviews did generate one example, relating to Poland, of proactive brokerage by an in-country UKTI representative and a second example relating to what was felt to be poor advice on entry to the Chinese market which had been given to another interviewee (see Appendix 1). The general feeling emerging from the interviews was that the main barriers to progress are:

- UKTI lacks understanding and knowledge of the export achievements of the sector;
- UKTI has a low level of awareness of and the potential for export of the services offered by the sector;
- Currently, UKTI only promotes limited opportunities to the sector – this was an especially strong message from the design company interviewees.

However **there were also a number of positive suggestions for ways forward** which do not appear to be too resource intensive for UKTI: For example, there are some interesting proposals relating to working in emerging markets and for a national museums strategy, which are outlined in Recommendations B and C.

A proposal for working with UKTI in China, which is felt by all to be a particularly difficult market for this sector, was also suggested. In China, a crucial role could be played by UKTI in brokering partnerships with big UK organisations especially those working on construction and infrastructure tenders with a cultural or leisure dimension. This approach could bypass the need for SMEs to invest in local offices and local partnerships and would it is hoped provide access via the lead partner, to appropriate advice on contracts and the negotiating culture of China.

Some of the interviewees who had dealt with UKTI (and the British Council (BC)'s overseas offices in the past, raised the issue of a lack of staff continuity: The key complaint is that members of staff in local offices who have an understanding of their business are later replaced by someone with little relevant knowledge or interest.

This same criticism of the British Council's in-country offices arose frequently in the research interviews which Otravista conducted for the BC commissioned, '*A Review and Taxonomy: International College Partnership Models*', and would suggest that action needs to be taken to ensure improved 'succession planning' within government departments and national agencies, especially in an environment of significant staff turnover.

Generally **the interviewees were receptive to developing a more effective working relationship with UKTI** and the conclusions and recommendations which follow, are informed by Otravista's analysis of the interview data and some specific suggestions made by interviewees for the expansion of export opportunities.

3. SUMMARY OF RESEARCH FINDINGS

The value of the sector

The DCMS produces an annual survey *Creative Industries (CCI) Economic Estimates Statistical Bulletin*. The most recent bulletin was issued in January 2009. It showed that the CCIs contributed 6.4% of Gross Value Added (GVA) in 2006 and the sector grew by an average of 4% per annum between 1997 and 2006 compared to an average of 3% for the whole of the economy in the same period. The sector also earned £16 billion from exports of goods and services in 2006: 4.3% of all goods and services exported.

There is no mention of museums and galleries as a sub-sector of CCI in this report. This supports some of the interviewees' assertions that although the government has conducted research on visitor numbers, links to tourism and diplomacy-related strategies it has yet to look at the value of the sub-sector's contribution to exports.

Views from UK national agencies

British Council, Museums, Libraries and Archives Council (MLA) and Museums Association (MA) overview – It was felt that most UK museums do not have an exports agenda and that they have limited potential for exports, but that **there are some big museums which are very active in the international arena**. There are also some specialist suppliers particularly of design/exhibition services, which achieve significant export income. It was also suggested that there could be better coordination between the Foreign and Commonwealth Office (FCO), Department for Culture, Media and Sport (DCMS) and UKTI in relation to linking opportunities and providing clear and consistent information to interested parties in a coordinated manner. This would facilitate a more rapid and coherent response to opportunities arising from government-to-government dialogue.

The MA also expressed reservations about the value of overseas trade missions which have a mixed focus and cited the example of a mission to India which was led by UKTI in recent years. Though the benefits in terms of cultural relations were acknowledged the commercial benefits were unclear and it was asserted that:

“At present there is no logic to the choice of markets chosen.....Systems to provide advice on funding are needed – a consultancy or organisation which can identify and make links with associated markets that will generate income and increase audiences.” (Mark Taylor, Museums Association)

National organisations already work with associations in other countries, on both an individual basis and via international networks such as the *International Council of Museums (ICOM)* - <http://icom.museum> and the *Network of European Museum Organisations* - www.ne-mo.org. The MLA in particular also has 'products' with potential for extension to the international context and international markets, especially countries whose museum system is still developing.

Creative Britain: New Talents for the New Economy increased the emphasis on the Regional Creative Economy, including support for 'creative clusters'. In accordance with this strategy, the MLA's '**Renaissance Programme**' supports the development of 'regional museum hubs' - clusters of 4-5 museums which receive government funding to help them become centres of excellence and leaders of their regional museum communities. See: www.mla.gov.uk/what/programmes/renaissance

The MLA also runs an Accreditation Scheme which sets a nationally agreed standard for museums in the UK and supports them in identifying opportunities for further improvement and development. See: www.mla.gov.uk/what/raising_standards/accreditation

The MLA helped to develop a **Culture and Sport Planning Toolkit**, which includes advice, guidance and case studies to support the development of a quality cultural infrastructure. Details can be found at: http://www.mla.gov.uk/news_and_views/press/releases/2009/CSPT
<http://www.living-places.org.uk/>

Overview of the UK offer

World class museums - *'The UK's location between the US and Asia – and the current vibrancy of Britain's creative economy – places us in a unique position to become the world's creative hub, developing and sustaining relationships through cultural exchange. This also promotes the flow of creative talent to and from this country necessary to continually refresh and invigorate our creative economy.'*
(*Creative Britain: New Talents for the New Economy*)

The UK's top museums are respected around the world and many museums are actively maintaining an international profile and developing new business opportunities via a range of partnerships, conference events and networking. Most interviewees also emphasised the important role which cultural institutions play in influencing international perceptions of the UK and this includes (for example) through their work in encouraging and supporting other countries to take a different perspective on the roles of their museums, not only in the context of tourism strategies, but as a vehicle for articulating their nation's culture.

Due to the fact that museums are in most cases non-commercial bodies, it must be recognised that in some cases, international partnership and supporting capacity building will be seen by museums to be as important as generating additional income. However, this does not preclude some museums, such as the Natural History Museum, from undertaking income generating consultancy and exchange of exhibits (see Appendix 1) and there is scope for UKTI to support these objectives (see Recommendations).

Some UK museums/galleries are running programmes which have the potential to be extended to the international context via partnership and franchise arrangements: for example, the Whitworth Art Gallery in Manchester runs, '*New Contemporaries*' which provides an important showcase for design and art graduates from the

University of Manchester. The MUDAM in Luxembourg saw the potential of this model to give much-needed international exposure to its country's own artists and the Whitworth was interested in the possibility of an international collaboration.

Museums and galleries also generate income via loaning items from their collections, and this too was confirmed by MUDAM (for example) to be an attractive resource for institutions which cannot afford to build large and high-profile permanent collections.

'Loan demand has also been fed by the global boom of new museums and gallery developments, many of which have limited collections of their own. For museums with high profile collections and the expertise to mount exhibitions, this presents numerous opportunities, in some cases with the potential to develop profitable sources of income.' (National Museums Conference report - 'International Dimensions', 2002)

World class specialist design companies – The research identified a small but internationally active group of companies with an established track record in delivering prestigious projects in the Middle East, North America, and, to a lesser extent, China and Eastern Central Europe. **These interviews highlight the fact that there are opportunities for UKTI to work with these companies** and their peers, to develop strategies for the achievement of greater business success overseas (see Recommendation D).

All interviewees stated that government-to-government dialogue is a very important vehicle for initiating discussions which could lead to business and partnership opportunities for UK companies, but one interviewee asserted that Embassies do not always take a sufficiently broad view of how these can be translated into tangible business outcomes. This particular company had worked on the Grand Egyptian Museum (which will be one of the largest museums in the world) and had received no support from the Embassy or the Ambassador.

Education (HE) - UK universities provide a range of programmes from short specialist professional development courses to post-graduate qualifications and research degrees. Key examples of full and part time HE programmes include undergraduate or Master's degrees in subjects such as Museum & Collections, Heritage Management, Museum Studies, Curatorship and Digital Media (for exhibitions). Short courses typically cover topics such as conservation practice, art and object handling and installation and use of relevant technology. Full-time HE courses include both critical/theoretical elements (including in relation to the wider role of arts and cultural venues) as well as associated practical elements and most well-reputed UK HEIs focus on up-to-date practice and provide access to high quality work placements, technology and networking opportunities.

"Our [design & museum] HE provision attracts a global clientele as they complement the learning with a chance to meet many of the top-rated practitioners in the world."
(Celestine Phelan Event Communication)

The **University of Leicester** (which was selected as University of the Year' 2008 by the *Times Higher Education Supplement*) is one of the leading UK HE providers of specialist training for the sub-sector, via its internationally acclaimed Department of Museum Studies.

'For more than 40 years Leicester has played a key role in turning a field devoted to training museum professionals into a research field capable of shaping social and intellectual agenda, and encouraging a profession to rethink its role'. (Leicester University website)

The **Whitworth Art Gallery** in Manchester is an example of a major venue which is owned by and is part of a university and this underpins its active role in local regeneration as well as helping to define some of its international opportunities.

In addition to the fact that these are some of Britain's 'flagship' arts institutions, *"Museums, galleries and libraries are a significant part of the creative infrastructure, engaging the public in questions of design, while raising aspirations and providing an essential resource to creative industry students, teachers and practitioners". (Creative Britain: New Talents for the New Economy)*

The UK education sector is a very important contributor to the success and impact of the museums and galleries sub-sector as well as being a key partner in the implementation of its activities. The role of education encompasses initial training and workforce development for the creative industries at all levels (from embedding creativity in the school curriculum to helping to equip tomorrow's 'cultural leaders'), undertaking research, assisting arts and cultural institutions with the delivery of their own education and community engagement programmes and co-operating with these institutions on specific programmes aimed at widening participation in the CIs. Collaborative models, which include for example, the National Skills Academy (NSA) and 'Creative Apprenticeships' are a 'distinctive strength' for the UK and are as much a part of knowledge transfer and international export potential as the direct services which each sector offers.

Many of the universities and colleges which run courses relevant to culture and heritage and to the operation and management of museums and galleries, recruit individual overseas students to their programmes.

At the Association of Colleges' conference (June 2009), Lord Davies highlighted the commitment of the new Department for Business, Innovation and Skills (DBIS), to promoting the UK's education export 'products' within the wider objective of cultural diplomacy. He emphasised the important role of international students as positive 'ambassadors' for the UK, and as a mechanism for establishing links with other countries which will benefit businesses, institutions and the UK economy. It should be noted that general programmes offered by both HE and FE, such as those relating to design, digital media, new technologies and business studies and marketing, may also feature prominently in initial training and workforce development for the museums and galleries sub-sector.

The growing demand from overseas museums and galleries for capacity building via professional development, has been identified by specialist design companies in the UK. Increasingly, their clients are requesting that this should be integrated into the service offer. In practice however, organisations frequently under-estimate the time needed to develop the skills of the staff and resort to buying in expertise to speed up project delivery. In either scenario there are opportunities for UK companies and education providers to support this development.

Museums, galleries and design companies are themselves often involved in the direct provision of professional development, for example the British Museum and the Natural History Museum both deliver specialist training on conservation.

The University of Leicester runs 'master-classes' in museum exhibition design in conjunction with both Land Design Studio and Metaphor as well as other specialist design companies and the university also exports a range of short courses which are run in collaboration with international architects.

"I ran a master-class at Leicester University. I think Leicester's work is worth supporting and there can be business benefits too. It produced business leads from people going home and recommending Metaphor to their bosses looking for design specialists." (Stephen Greenberg, Metaphor)

*"I spoke at the '**What makes a World Class Museum?**' [master-class]; "there is an appetite for this type of event and big scope for expanding this type of programme....it's amazing the number of our clients that have come from Leicester courses and their distance learning programmes."* (Bill Haley, Haley Sharpe)

The Sector Skills Council, 'Creative and Cultural Skills' worked in partnership with the Arts Council of England and the Museums and Libraries Association to develop the '**Cultural Leadership Programme**' which runs until 2011 and is designed to provide leaders at all stages of their career with the skills they need to succeed, as well as, '*improving the business impact of cultural creativity*' and improving diversity at senior management level within the sub-sector. This programme itself supports the '**Clore Leadership Programme**' which offers short courses to leaders across the cultural sector. These products have export potential in terms of both delivery (extension to the international context) and adaptation of the model - support for other countries in setting up similar programmes via consultancy and transfer of expertise. Further information can be found at:

www.ccskills.org.uk/Solutions/CulturalLeadershipProgramme/tabid/79/Default.aspx

Education (FE) - UK FE Colleges also offer a variety of relevant programmes and those which are credit-bearing generally fall into the category of National Vocational Qualifications (NVQs) - most commonly at levels 2 and 3 with a focus on 'Cultural Heritage Operations' or 'Heritage Care and Visitor Services'. Some colleges offer higher level NVQs with a management dimension and Foundation Degrees (FD): these are accredited by Higher Education Institutions which themselves often run FDs; this is usually a variant of Heritage Management which may include an additional emphasis on Conservation in the Built Environment or Environmental Conservation. A few FE colleges also offer relevant short courses in subjects such as Museum and Heritage Management, some of which bear HE credits.

It should be noted that though other awarding bodies accredit visitor services and tour-guiding as part of their tourism portfolios, the main UK awarding body for FE qualifications which are relevant to museums and galleries is **Education Development International - EDI plc** (www.ediplc.com). EDI offers a range of flexible qualifications in the UK and internationally, via the London Chamber of Commerce (LCCI). Examples which are relevant to the target sub-sector include Cultural Heritage Operations, Museums, Galleries and Heritage, Curating, Conservation, Architectural Practice and others, (variously) from levels 2 to 5.

Whilst HE contributes to the development of 'cultural leaders', managers and specialist staff, FE colleges (often working with employers or the cultural venues themselves), deliver programmes aimed at widening participation in the creative industries, including the museums and galleries sub-sector. A key example is '**Creative Apprenticeships**' which are described by the Sector Skills Council as '*an alternative route into the creative industries, one based on ability and potential rather than academic track record.*' These apprenticeships offer young people the opportunity to acquire knowledge and skills through attaining industry-approved qualifications, via a mix of on and off-the-job training, including key skills. See: www.ccskills.org.uk/Qualifications/CreativeApprenticeships/tabid/82/Default.aspx

The Victoria & Albert Museum (V&A) in London is a field-leader as a major institution which has prioritised the creation of professional development and career pathways at all levels within its training policy. The V&A has worked with Kensington & Chelsea College and EDI plc to design a suite of NVQs within a framework of six 'Creative Apprenticeships'. The programme offer includes a five-year Assistant Curator award and a new award in conservation.

"Roles within museums are evolving and so people need more transferable skills which are not necessarily acquired via HE courses": (Veronika Harris Head of Training V&A)

The V&A is strongly committed to opening up career opportunities at all levels within museums and galleries, for those who have not taken traditional Higher Education routes. The museum has a substantial international training operation which targets both individuals and overseas ministries and Veronika Harris stressed the

importance of promoting the role of the museum as a community resource within international programmes as well as the fact that accreditation is very important in some countries (e.g. the Middle East).

These views were shared by the FE college representatives who were consulted during the study. Fintan Donahue, Principal of North Hertfordshire College, who was recently elected as FE representative on the NSA board, asserted that:

“A key issue is the multi-functional nature of today’s jobs within galleries – you need to have technical skills as well as working on things like education programmes — less a feeling of ‘this is my particular job’ and more transferable skills”.

Fintan sees Creative Apprenticeships as a key vehicle for combating elitism and reliance on unpaid work to gain the experience needed to work in museums and galleries. He also suggested that the PTLLS (Preparing to Teach in the Lifelong Learning Sector) and DTLLS (Diploma in Teaching in the Lifelong Learning Sector) could be used to equip people to work in this sub-sector. These qualifications are still relatively recent developments for the UK but a number of colleges are already using them in programme delivery for international clients.

It is important to note that the models described above are still new and have not yet been tested in the international context. However, in view of the fact that some of the key target markets are countries which are coping with rapid growth in their museums sector (often linked to new levels of independence or the expansion of their tourist industries) at the same time as tackling issues of social exclusion and lack of parity of esteem between HE and vocational qualifications, **these models could represent key export opportunities for the FE sector** working with employer, awarding body and Sector Skills Council partners, in the short to medium term future.

Like universities, FE colleges are well-experienced in partnership working with their overseas counterparts and these sometimes include other agencies such as regional governments or employers’ organisations in the target countries. Greenwich Community College and City College Plymouth worked on a heritage tourism project in Ghana with the Tema Municipal Authority and the Tourism Development Agency in Sekondi Takoradi which was linked to the Ghanaian government’s plans to develop the country’s tourism industry. A range of employers were also involved and UK Government and the Commonwealth Local Government Forum supported the project. These partnerships models help to lay important foundations for commercial activities but the research did not identify any current projects at FE level, which are specifically targeting international museums and galleries.

North Hertfordshire College and other FE interviewees emphasised the need for promotional and development strategies to engage with the (new) Creative and Cultural Skills **National Skills Academy** (www.nsa-ccskills.co.uk): *“We need more FE ambassadors to take these messages abroad and look at the internationalisation of career development – the NSA wants to do this.”* The NSA

would provide a mechanism for engaging both some of the major cultural institutions and employers within the supply chain. Hackney Community college has already had some initial discussions with its local 'creative quarter' business cluster about how they might work together to offer some training products for local galleries and this kind of development may have potential for extension to the international market, especially where education providers are able to operate as part of a mixed consortium. The V&A has developed a range of online training materials for use by domestic and international clients in the museums and galleries sub-sector as well as individuals. This is a very much under-exploited area for UK FE colleges, one in which they may be able to progress more effectively if they were to work with private sector partners.

Opportunities for consultancy as well as partnership activities and knowledge transfer related to the above, may also exist at European level. The interview with the Netherlands Museums Association (Nederlandse Museumvereniging) revealed that Dutch museums are grappling with similar issues of defining job roles and related skills, competences and career pathways within the country's (newly independent) museums and they are interested in (for example) the 'creative blueprint' model which has been developed by Creative and Cultural Skills in the UK.

Education (Work Experience and Exchanges) – A significant number of interviewees from all sectors (including international organisations) highlighted **the significant benefits of exchanges, placements and internships**. Some major UK institutions including the British Museum and the Natural History Museum, are already involved in providing these. Design companies also host placements for individuals (usually self-funded) and those interviewed indicated that they would be willing to expand this activity and to create specific internship programmes, subject to appropriate processes for selecting candidates.

"We recently hosted someone from Mumbai; there is scope to do more [hosting of interns from overseas], working with Event and other companies and museums if BC and others could fund bursaries. Perhaps the Clore Foundation would be interested?" (Celestine Phelan Event Communications)

Interviewees from international museums/galleries were keen on this model: for example, Germain Kerschen from the MUDAM in Luxembourg Curatorial said that his institution and others find it difficult to source Luxembourg nationals with appropriate skills and experience in curating *"all our curators are French."* He feels that placements and exchanges could provide a valuable vehicle for professional development exchanges and could also help to ensure that the MUDAM is perceived as an international organisation. Dutch (Nederlandse Museumvereniging) and US (Yale Center for British Art) were also enthusiastic about curator exchanges and (in the case of the Dutch) placements for staff in a range of roles within museums. The Spanish research identified a need (though no apparent demand for) cultural leadership placements (see Appendix 5).

Though a number of colleges have made use of European mobility funds on an ad hoc basis, FE sector interviewees highlighted the fact that there is currently no national network for international exchanges (staff and students) to support curriculum and career development for the museums and galleries and stressed the fact that a mechanism of this kind would be very valuable. Unfortunately, the costs of these activities outside Europe can sometimes be prohibitive for FE colleges in particular, and existing international mobility programmes such as the Prime Minister's Global Fellowships are subject to specific conditions in terms of focus and eligibility.

The Third Sector – Although it may be a niche product with limited export potential, the UK's third sector has a lot of expertise in working within partnerships that develop museums and galleries as community resources and as venues for and providers of informal education. Third sector organisations also work with museums to achieve audience diversification and the promotion of a more inclusive ethos. This expertise could be used to add value to large commercial contracts.

As a result of the interview Arts & Business (AAB) has agreed to explore the viability of a few (suitably experienced) third sector member organisations delivering consultancy and knowledge transfer to international clients. AAB will also consult corporate members of AAB, which work on international construction and regeneration contracts, to see if they would be interested in making clients aware that this expertise in community engagement could be purchased as additional consultancy or used to enhance future tenders. (It is also worth noting that Leicester University identified community engagement as a gap in both UK and international markets, which it will seek to address through its own programmes).

Market issues

European Market – The general view emerging from both design and museum interviews may be summarised as follows:

1. **Western European** countries can be "*hard markets to crack*" because of in-country expertise, the politics of contracting outside the home country and in some cases, even contracting outside a specific city or province. Established EU member states are more likely to be a source of competition than opportunities. "*The UK is seen as an ambassador of 'good practice' – Germany is close competition.*" (MLA). However, the Dutch and the Belgian interviewees did express an interest in working with the UK to address common issues facing museums and galleries and, in the case of the Dutch, possibly on joint approaches to wider international markets. Malta may also offer some specific opportunities as it "*has 35 museums which require unification.*" (Roy Clare MLA).

2. **Eastern Europe** was described as "*unexplored territory*" (Mark Taylor MA) however Event Communications believes that Central/East Europe's extensive cultural and architectural heritage is largely untapped in terms of tourism and local economic development and that despite immediate pressures on the economies of

these countries, there is potential to cultivate contacts and build local knowledge in anticipation of better times ahead. The Dutch Museums Association is working extensively on capacity-building programmes in Eastern Europe, but mainly with funding from its own national government. There are examples of current work in Poland being undertaken by UK design companies and a number of UK FE colleges are working in eastern Europe to deliver general programmes such as English language which may be relevant to the sector.

3. Spain: *Otravista Espagna's* research (see Appendix 5) shows that relevant opportunities do exist in Spain, but as in the case of the UK research, it appears that these are more likely to be accessed through relationship building and one-to-one negotiation than via open tenders. Though three potential opportunities were identified in relation to Malaga, the research on this region further supports the conclusion (as detailed in Appendix 5) that UKTI's resources might be more effectively focused on emerging markets. The City of Culture programme in Spain (see below) does not seem to be a catalyst for significant new business opportunities in Malaga and other Spanish cities which are competing for this award.

It should be recognised that another barrier in Spain is the force with which the economic downturn is hitting that economy. *'According to the country's National Statistics Institute a record high figure of 17.4 per cent were unemployed in the first quarter of the year'* (Times On Line). According to the latest Eurostat statistics, this is the second highest rate in the EU27. Unemployment is especially prevalent in the South which has seen the collapse of the construction sector and falling tourism. The regional government of Andalucia is predicting a drop of up to 50% in tourism revenue in 2009 and an increase in youth unemployment to over 40% by the end of the year. Spain also has one of the worst records amongst OECD countries for supporting employees in accessing training and professional development. This is perhaps largely due to the fact that 36% of the working population has temporary contracts compared to the EU average of 15%.

4. There is scope for more **knowledge-based partnerships** and exchange programmes to be developed, especially those which have an educational or professional development focus. Some of the UK, Dutch, Luxembourg and American interviewees expressed a significant appetite for this type of engagement.

5. **EU programmes** could be more fully exploited to support relationship-building, joint development and mobility in order to lay a foundation for commercial activities: This includes those which are sector-specific such as *'Culture 2007-2013'* and education programmes such as *'Leonardo da Vinci'* and *'Grundtvig'* within the *Lifelong Learning Programme, 2007-2013*

EU City of Culture Programme – This small 'sample' study does in fact indicate that concrete opportunities are limited. The research did not identify any examples of contracts arising from a City of Culture (CoC) programme or CoC candidate status, other than one CoC-related contract in Istanbul. This was however, won via personal

networking, perhaps helped by the fact the three lead contacts in Istanbul are all enrolled on Leicester University Museum Studies distance learning programme.

In the year 2016, it will be the turn of a Spanish city to be named European City of Culture, and candidates must present their bids before 2012. Cordoba and Malaga are amongst the 17 Spanish cities including San Sebastian, Caceres, Valencia and Tarragona, which have expressed interest. Interestingly Cordoba, which has employed a British consultant who worked upon the Liverpool City of Culture programme as part of its CoC team, is emerging as one of the stronger candidates and it is possible that the UKTI office in Andalucia could capitalise on this UK connection.

Another example of CoC related activity identified by the research was in Antwerp, which was City of Culture in 1993. In this case being CoC engendered a more outward looking ethos in that City. For example the city held an international competition, with a panel of international judges, to find an architect to design the new MAS Museum (Norman Foster's company was short listed but the contract was awarded to a Belgium architect). The director of this flagship museum has subsequently developed a relationship with British museums including the V&A, which includes consultancy relating to the development of management structures, staff training, curating and marketing (see Appendix 1).

Global Market Opportunities – The consensus amongst the museum and design company interviewees was that the greatest commercial opportunities lie in the emerging economies of the Middle East, South America (especially Brazil), Egypt, and China/Taiwan. It was suggested that UKTI would be most likely to add value to the sector's exports output if it were to concentrate its efforts on these markets (see Recommendation C). It was also suggested that collaborating with the big museums would assist UKTI in gathering this market intelligence (see Recommendation A).

Opportunities in other areas such as the Mekon Delta (Thailand and Vietnam), India and Azerbaijan were also highlighted by education interviewees who gave examples of specific areas of identified demand: management, curating, customer service skills, design and exhibition production expertise. Formal accreditation of education and training programmes is important in some regions (such as the Middle East where there is no workforce development structure).

Possible mechanisms for intervention

Conferences – There are a number of conferences which attract a global audience: notably those of the International Council of Museums (ICOM)

<http://icom.museum/internationals.html> It was felt BC and, or, UKTI could be more proactive in working with and supporting the sector in utilising such events for promotion. ICOM's published strategy appears to be consistent with this report's interview findings: In 2010, ICOM plans to reinforce its presence in the some of the emerging markets listed above: firstly, two major events will be organised in Shanghai; secondly, ICOM has established the ICOM United Arab Emirates

Committee and thirdly, Rio de Janeiro has been selected as host city for the ICOM 2013 General Conference (<http://icom.museum/release.june2009.html>). “We [the UK] miss a trick at such events because there is no coordinated or considered approach to marketing and promoting.” (Jack Lohman Museum of London). This sentiment is echoed by the call from the FE/VET sector for a more coherent UK presence at international education events and this partly led to the creation of TVET UK (www.tvetuk.org).

Exploiting specialised niches – The sector’s best prospects for increased export activity could result from a targeted approach – the UKTI working with key players from the following sub-sectors: museums, design and exhibition producers, and HE providers of high-level museum related provision to market high quality expertise and services specific to the international museums sector.

Focus on Priority Markets – UKTI should seek to work with the above stakeholders (and where appropriate, involve FE partners) to maximise income and partnership relationships in a small group of territories. It is important for the UK government to ensure good linkages between DBIS and other departments involved in high level government-to-government dialogue.

Trade Missions – There is not much enthusiasm for this approach in the way that it had worked in the past, as it is felt that missions which are too disparate in structure do not do justice to the niche areas in which key commercial opportunities might lie. If this approach is to be tried in the future consultation by UKTI with UK stakeholders and international hosts is essential in order to ensure a more targeted missions with a clear agenda.

Fact-finding visits – These were proposed as an alternative to outbound trade missions with the UKTI brokering visits by appropriate overseas delegations, individuals, companies and museums in order to increase potential clients’ awareness and understanding of what is available in the UK. This should be considered by UKTI and perhaps could be undertaken in collaboration with BC.

Production of ‘fact sheets’ – A lack of knowledge of the sector on the part of UKTI’s in-country offices was cited as an issue by a number of the interviewees. Simple ‘fact sheets’ for in-country UKTI representatives could be produced to raise awareness of what UK museums and galleries sub-sector has to offer as well as the relevant provision of UK HE and FE institutions. This would develop UKTI’s staff capacity to identify and disseminate relevant opportunities from regeneration, tourism and one-off initiatives which may arise in both priority and non-priority markets.

UKTI staff visits - The fact sheets could be complemented by some visits to key UK organisations when the staff of UKTI’s local offices come to the UK and supplemented by presentations from representatives of the sector(s) at regional UKTI meetings and training sessions.

Education and training: Brokerage and customised product development - Two key areas of demand for workforce and professional development emerged from the study: **Support for ‘cultural leadership’** and the **development of transferable skills linked to the evolving job roles within museums and galleries** – both of these areas are key to capacity-building. Both education and cultural institutions are involved in the delivery of relevant programmes and could benefit from a more co-ordinated approach which is proactive as well as reactive in relation to international opportunities. A key example of a specific ‘product’ which could be developed is a globally focused programme for cultural leaders, which is designed and marketed to attract participants from around the world. The possibility of the UK establishing a global programme to rival the Getty Foundation’s Museum Leadership programmes was raised (www.getty.edu/leadership/).

“There is a need for some equivalent to the Getty Museum Leadership Institute in the UK. It will build capacity of the sector and enhance international links.”
(Celestine Phelan of Event Communications)

This would make a significant contribution to raising the profile of UK museums and galleries and establishing the UK as *‘the world’s creative hub’*.

Support for Placements and Exchanges – The benefits of placements, secondments and exchanges of cultural leaders, gallery and museum staff, education staff and learners were emphasised by a variety of interviewees. These exchanges facilitate the transfer of knowledge, experience and expertise. A significant amount of activity is already in progress (especially in the case of museums and HE); however, the interviewees also felt there was potential to develop and promote new models to the international market: for example, curatorial internships for museum staff from countries where museums systems are still developing. It was suggested that the establishment of an ‘exchange and placements bureau’, which focused upon the Creative Industries or museums and galleries sub-sector, should be considered to support UK education institutions in arranging relevant activities at both European and international level. (see Recommendation E)

General points

Partnership - A recurring message was the importance of personal contact, initial relationship building and establishing trust and mutual respect. This is seen as the foundation from which a lot of partnerships evolve into commercial activities.

“The expertise within the museums is also a big resource; it opens doors for dialogue with overseas institutions to build partnerships and can provide advance intelligence of contract and tender opportunities”. (Celestine Phelan Event Communications)

The importance of building relationships – The interviewees all emphasised the value of networking at conferences and contacts arising from participation in master-

classes run by UK and overseas universities, as well as involvement in other related networks e.g. UNESCO.

‘Joined up’ government – There appears to be genuine scope for UKTI to build on some activities funded by DCMS and FCO – for instance ensuring that the potential benefits and commercial opportunities arising from relevant ministerial, culturally focused visits which DCMS or FCO may organise are communicated to the sector. DBIS now has a minister, Lord Davies (formerly of BERR), who reports to both the Business Secretary and the Foreign Secretary and so may be well placed to champion such an approach). Closer co-operation between UKTI and the British Council in some areas may also be productive.

“It’s crazy that we are not joined up as we could be. We need a more coordinated approach to selling our expertise in around the world.....This is where the UK government could play a valuable role. The French government were very instrumental in the negotiations for the Louvre building an extension in Abu Dhabi. In France the big museums are more directly controlled by government so perhaps it is easier to set up [such opportunities] but there are a number of national museums in the UK that could take advantage of such opportunities if government understood the capacity and interest that exists [for such projects]”
(Dr Michael Dixon, Natural History Museum).

Raising awareness of the sector’s character, aspirations and provision – This was deemed by interviewees to be very important and specific actions for UKTI have been suggested within previous sections and the Recommendations.

“If we can help UKTI to raise awareness among their international offices - who we are and what we do - there is more chance of making productive links, facilitating visits to UK to meet practitioners or taking groups from UK to meet contacts (in-country)” (Celestine Phelan, Event Communication).

Cultural diplomacy – although this is more explicit in the work of the BC, there is also a business case for UKTI working with museums and galleries and education institutions to increase knowledge exchange and capacity building partnerships. In many cases this type of relationship can help to establish the UK as ‘the partner of choice’ if expertise is to be bought from overseas.

‘The UK must aim to become a global creative broker. It can do this by building on the international work of the British Council, exploiting government assistance to the creative sector to access new markets and by forming effective international partnerships.’ (Creative Britain: New Talents for the New Economy)

4. RECOMMENDATIONS FOR INITIAL INTERVENTIONS BY UKTI

A. Market Information

“Even in America this [access to market specific advice] is a big factor and in the Middle East, negotiations tend to be longer and you can invest a lot of time and resources in negotiations that go nowhere. It is worth getting good local advice” (Bill Haley, Haley Sharpe).

Some companies use **OJEC** (www.ojec.com) which provides notification of tenders for European funded projects. However it was felt that these tenders, which often entail pre-qualification processes, complex proposals and onerous administration, do not warrant the time and effort required to create a competitive proposal. One interviewee referred to the use of a subscription service, which is provided by a micro-enterprise in Canada that offers a similar facility to OJEC for tenders in USA and Canada. There is also a service offered by **MERX** (www.merx.com) which gives notification of Canadian public tendering opportunities and can produce 20-50 leads per day. In spite of the volume of this information (much of it irrelevant) some tenders “*slip under the radar*” and thus UKTI can be a valuable additional source of market information. As Haley Sharpe found in Poland, UKTI can signpost UK organisations to appropriate in-country business and legal services. The further development of this type of support would strengthen the quality of tenders produced by UK organisations.

UKTI’s capacity to provide market intelligence and increase the effectiveness of local offices could be enhanced through the collation and circulation of fact sheets as described above. These could include: a summary of key products and services; links to relevant web sites and contacts from the museums, companies, universities and colleges (with their agreement) and examples of international work done by the sector. In-country officers would be better equipped to assess and disseminate any potential opportunities arising from:

- City of Culture or other regeneration programmes
- Tourism development strategies with a cultural dimension
- Government to government or similar high-level dialogue which may address some of these points or other relevant aspects of cultural policy

Suggested actions:

- Take steps to raise the awareness of local office staff through contact with the sectors (museums, businesses and education providers),
- Review training, induction and succession planning to ensure that the expertise and the contacts established by a staff member remain in the office should the person be transferred to another country/dept.
- Produce and circulate a ‘sector fact sheet’ to all UKTI offices following discussion with key stakeholders and practitioners

B. Consultation with the World Collection Programme Partners

In the spirit of 'joined up government' UKTI could develop links with The World Collections Programme, a DCMS funded project, involving the British, Natural History, Tate and V&A, the British Library and Kew Gardens. This programme is funded by DCMS for 3 years to promote British culture through the exchange of collection items, capacity building (primarily in Africa) and provision of conservation and curating expertise. It is one element of the DCMS International strategy to: *'reinforce existing, and build new and sustainable relationships between cultural organisations in the UK and around the world'* ([www.culture.gov.uk/what we do/international/default.aspx](http://www.culture.gov.uk/what_we_do/international/default.aspx)).

The World Collections Programme partners include the Chair of the National Museum Directors' Conference, Dr Mike Dixon. In his role as Chair, Dr Dixon would seek to involve other NMDC members in any plans which emerge from discussions between the World Collections Programme partners and UKTI. He believes that his NMDC colleagues would welcome a chance to explore how UKTI could take forward the NMDC's international strategy, which includes a focus on developing and exploiting commercial opportunities. Such discussions could focus on:

- How opportunities for the sector arising from government-to-government dialogue can be identified and disseminated to the sector more effectively,
- How UKTI may be able to support or broker support from other government departments especially DCMS and FCO,
- The identification of priority markets such as Brazil, the Middle East etc.
- How UKTI might be able to broker links with some other important international (commercial) players, especially potential links with big construction and scientific companies in order to explore collaborative business models,
- The benefits of encouraging and supporting 'ambassadors' from the sector's key institutions to participate in key events and fora.

Suggested actions:

- Contact Dr Mike Dixon in order to arrange the World Collections Programme partners' meeting
- Discuss with Dr Dixon whether additional invitations should be issued for example to Jack Lohman of the Museum of London (point C. below) and other key members of NMDC with an international an 'track record' (or a possibly a follow-up meeting arranged).

C. Priority markets

Through the discussions it became clear that most interviewees feel that the real opportunities for international activity lie outside the EU.

Jack Lohman, Director of the Museum of London, suggested that UKTI should pilot a 3-year programme for priority markets which should be run from 2010 to 2013. This should target at least one, but preferably all, of the following: Brazil, Middle East, Egypt, and China/Taiwan. The level of public and private investment and the proposed and subsequent activities would be documented in order to enable the assessment both hard benefits (bottom line) and soft benefits (networking, profile, market understanding, local partners) to companies and museums. Jack Lohman proposed that a review and evaluation should be undertaken at the end of the pilot, with the aim of developing and refining the approach (preferably in collaboration with some sector stakeholders) for future use in other markets.

He also pointed out that the International Council of Museums operates a travel bursary scheme which could support scoping and partnership visits to underpin the proposed strategy. He suggested that the UKTI could work with ICOM to promote these opportunities in order to expand international collaboration and commercial contracts for the sector. The current Chair of the UK members is Mike Houlihan of the National Museum of Wales, who Jack Lohman believes would be receptive to this proposal.

Jack Lohman feels strongly that the ICOM conference in Brazil in 2013 will be a very good opportunity to sell to the Brazilian market as well as providing exposure to an international audience of some 6,000 museum professionals. He advised that there may be some negative reaction to an overtly commercial approach by the UK and he therefore suggests that in order to exploit the full benefits of the event, an attempt should be made to secure UNESCO 'branding'. This would, he believes, maximise opportunities for UK delegates and as a UNESCO advisor he would be prepared to put this idea forward. Should UKTI choose to take forward this proposal it is suggested that the possibility of a UK's presence at events such as ICOM is explored as a vehicle present an integrated showcase for museums, universities commercial companies and innovative FE models.

Suggested actions:

- If this strategy is considered viable, arrange an initial brainstorm meeting with Jack Lohman to explore how the UNESCO 'branding' might work and to explore the market opportunities in more detail
- Consult with UKTI in Brazil on its capacity to deliver and raise awareness of the plans to host the ICOM event as well as to secure information about the Brazilian government's cultural investment plans,
- Consult with other UKTI offices in countries identified as priority markets

D. The Private sector

“Internationally we (UK designers) punch above our weight” (Celestine Phelan Founder Event Communications)

Interviews with design companies and museums revealed that there are 20-25 exhibition and museum design companies, which work globally and win the majority of major contracts. 5 or 6 of these companies are based in the UK and in some cases they have additional offices in key export markets. These UK companies have established an international profile and are actively developing new markets. The consensus is that the “*golden age of Millennium and Heritage Lottery funding*”, which had enabled them to build their track records and resulting ‘marketability’, was over. As a result, these businesses have recognised the need to diversify into international markets. The three companies interviewed would all be happy to receive visitors from potential commissioned projects, as well as to host individuals from emerging markets on a professional development placement (in fact, they are already engaged in this kind of hosting).

Companies such as Casson Mann, Cultural Innovations, Event Communications, Haley Sharpe, and Metaphor often sub-contract to specialist service providers in order to fulfil the requirements of individual contracts. If UKTI can enable a greater number of contracts to be won by these companies it will potentially benefit a much wider supply chain. One interviewee mentioned that, in the previous year, their company had a direct turnover of £15m and in addition it had project managed £70m in sub-contracts on behalf of clients. A significant portion of these sub-contracts were awarded to UK based companies.

Immersive design specialist Peter Higgins said that his company had acquired some valuable contracts in this way and other interviewees referred to UK suppliers (such as electronics, lighting and display case manufacturers) with which they would sub-contract when a project needed that particular service. The Museums Association has compiled a directory of these companies which could be an additional information resource to be included in the proposed ‘fact sheets’ (see Recommendation A): www.museumsassociation.org/suppliers

This business model is not unlike a film or TV production company which ‘buys-in’ appropriate expertise on a job-by-job basis from sole traders, micro enterprises and SMEs. It may also offer an effective model through which UKTI can co-operate with these design and exhibition companies. By working with this small group of companies with established international track records UKTI could also help smaller supply-chain companies to increase their export earnings through the resulting sub-contracts. UKTI could find that this approach proves to be more effective than investing in costly outreach and marketing to a ‘hard to reach group’ of sole traders and micro enterprises.

Suggested actions:

- Establish direct contact with these companies to explore how visits to their offices and projects can be used to build UKTI staff understanding
- Invite them and any peers they suggest to an exploratory meeting to consider what information businesses need to enable them to tender more effectively in target markets and whether UKTI can help provide this,
- Review the potential to broker links with TVET UK and, or, the NSA
- Consult with the companies to agree how in-country UKTI officers based in the priority markets could best be encouraged to build direct relationships with them,
- Consider whether there is something to be learnt from the US and Canadian approach. Competitors from the US and Canada, such as Lord and EDAW, *“seem to be so good at picking up local market intelligence and early leads”* (Stephen Greenberg, Metaphor) *“The US has developed a coordinated marketing strategy with govt. support and is winning a lot of contracts because of the quality of engagement which they provide”* (Jack Lohman, Museum of London).

E. Education and training

As well as providing targeted market information to the sector, UKTI could play a more active role in brokering cross-sector alliances, especially to help the sector to respond effectively to commercial opportunities, which result from government-to-government dialogue/Ministerial delegations. Although it may be unlikely in the current economic climate, pump-prime funding for the development of customised products to address specific demand would be very useful. One option may be to allocate some of the last year of PMI2 funding to this type of activity.

Whilst the National Skills Academy for Creative and Cultural Skills might be most appropriate organisation to take responsibility for the establishment of a 'bureau for international exchanges' (which is more likely to relate to FE than HE level with the co-operation of museums and galleries), the support of government departments and national agencies will be crucial.

There could well be a role for FE within the composite UK offer for the 'priority markets' strategy (see recommendation C above).

As part of its ongoing work to support the overseas promotion of the education sector as a whole, UKTI could include a specific focus on services museums and galleries in the context of the wider exports strategy for this sub-sector.

It is suggested that UKTI could work closely with the NSA for Creative and Cultural Skills as well as TVET UK, AoC, individual HE flagship institutions and appropriate HE fora.

Suggested actions:

- Explore the possibility of establishing a short-term museums/galleries sector sub-group within TVET UK and/or SAGES (Note: If there are not enough TVET UK members with an appropriate focus, other orgs could be introduced by the national agency representatives)
- Make direct contact with the new NSA for Creative and Cultural Skills and secure a spot at one of the board meetings – a meeting with the 12 founder FE colleges involved in the NSA was suggested by Fintan Donahue (FE rep to the board)
- Explore with the NSA and AoC, ways in which UKTI's wider exports activities (including those relating to the above recommendations) may support enhanced placements and exchanges

APPENDIX 1

Interviews conducted as part of this research

Jane Weekes, British Council
Mark Taylor, Director, Museums Association
Roy Clare, Director, Museums Libraries and Archives Council

Tom Bewick, Chief Executive, Creative and Cultural Skills (Sector Skills Council)
Veronika Harris, Head of Training, Victoria and Albert Museum, London
Fintan Donohue, Principal, North Hertfordshire College
Geoff Pine, Principal, Greenwich Community College
Ian Ashman, Principal, Hackney Community College
Dr Alaric Rae, Development Manager. EDI plc

Richard Sandell, Head of Museum Studies Department, University of Leicester
Andrea Hawkins, Head of Public Engagement, Whitworth Art Gallery, Manchester
Jack Lohman, Director, Museum of London
Dr Mike Dixon, Director, Natural History Museum, London
Simon Costin, Director, Museum of British Folklore

Stephen Greenberg, Chief Executive Metaphor
Celestine Phelan, Co-Founder, Event Communications
Bill Haley Chief Executive, Haley Sharpe
Peter Higgins, Director, Land Design
Jim Richardson, Director, Sumo Consulting

Beth Miller, Associate Director for Advancement and External Affairs, Yale Center for British Art, New York
Carl Depauw, Director MAS, Antwerp
Germain Kerschen, Head of Promotion, MUDAM, Luxembourg
Koen van veen, Project manager, Museumkaart, Amsterdam
Margriet de Jong, Head Advocacy and Member Services, Nederlandse Museumvereniging, Amsterdam

José Estrada - Director General - PROMALAGA - Local Development Agency - Malaga Council
Ana Umbría - General Coordinator - Centre of Contemporary Art Malaga (CAC)
Borja Castellano - Director of Business Development -Art Nature Museum (includes the Gemstone Museum)
Miguel Angel Piedrola - Director General - Interactive Music Museum Malaga
Alfredo Viñas, General Manager - Alfredo Viñas Art Galery
Pedro Pizarro - Independent Curator, Art Merchant, Art Critic - Ex-Director of Picasso Birthplace House (Casa Natal)
Museu de Prehistoria de València
Aurora Payá Rodríguez - Managing Director - EOS Art Gallery, Interior Design

Some extracts from the interviews which informed this research

1. Examples of Engagement with UKTI

POLAND

(Interview with Chief Executive Haley Sharpe Design www.haleysharpe.com)

Haley Sharpe found UKTI to be a good resource in Poland. The Poland office provided a lead which has enabled the company to pitch for a contract with the Gdansk War Museum. They found the Poland office to be “*very helpful*” providing a Polish speaker, advising on process, legalities etc.

CHINA

(Interview with Chief Executive Land Design www.landdesignstudio.co.uk)

Land Design is an ‘immersive technology’ specialist providing interpretative and presentational software for exhibition, museums and commercial promotional projects for car manufacturers retailers etc. The company’s experience in China was not a happy one and it felt UKTI could have been more supportive.

“We had a terrible experience in China. We spent 12 months and £44,000 on a project which never materialised. We are still owed over £100,000 and when we went to the UKTI in China for advice [on how to recover the outstanding fee] we got no advice, support or even much sympathy.”

“China is a difficult market, there are issues of intellectual copyright protection, a different negotiating culture and a different legal system. There is the need to set up a local trading company with a local partner... it is very hard for an SME and SMEs are the bulk of the Creative and Cultural Industries which the government is always talking up. To be honest we needed someone to hold our hands [through this process]. I would have been happy to pay a reasonable fee for legal and contractual advice”.

2. Museums

NATURAL HISTORY MUSEUM www.nhm.ac.uk

(interview with Director, Dr Michael Dixon)

“I do think the government doesn’t see science as part of culture but we would argue that museums like us and the Science Museum are part of our cultural heritage and we could be helped to develop our international activities like the Tate and V & A.”

The museum has a range of expertise – conservation, cataloguing collections, curating, palaeontology, biodiversity consultancy and environmental impact studies; currently it has research projects in over 60 countries and is also seeking to take management and other expertise to Africa/the developing world with support from EU funds.

Exhibition income: NHM designs exhibitions for touring around the world via host museums, with the aim of achieving a 7-year lifespan for a travelling exhibition. Income is generated in loan fees paid by host venues or in other cases reciprocal collection loans are agreed in lieu of commercial income.

Commercial Consultancy is marketed to external clients to generate supplementary income which is invested in the museum. NHM provides scientific research, environmental audit - clients include NASA, BP and Shell - an exhibition design team and conservation and museum management consultancy.

NHM has a **Tendering Team** which actively seeks opportunities and develops tenders for international and UK contracts. The museum's preferred model, such as that used in Expos Shanghai 2010 and Aichi 2005 (Japan), is to undertake a feasibility study and then act as consultant to a commercial lead delivery partner, which is proposed to the client by the museum, as part of the study.

Dr Dixon is the current Chair of National Museum Directors Conference (NMDC) and he sees **potential for stronger links with the NMDC** (see p.6). The NHM is also a member of a DCMS funded partnership of major national museums network, the World Collections Programme. He believes that there is the **opportunity to work with the museums to build a commercial dimension to this capacity building partnership** (see Recommendation B).

Whitworth Art Gallery (University of Manchester)

<http://www.whitworth.manchester.ac.uk/>

(interview with Andrea Hawkins, Head of Public Engagement)

The mission of the Whitworth Art gallery is **to become one of the top 10 university galleries by 2015**. The gallery has a very dynamic leader at its helm (Maria Balshaw) who has inspired the entire university gallery team. The Whitworth's 'philosophy' is that exhibitions need "content" and substance: *"Start with something you believe in and this will aid promotion and interest internationally"*.

The Whitworth generates collaborations around its exhibitions, e.g. as a result of touring, the 2008 exhibition focusing on William Blake which resulted in collaborative exhibition proposals and future curatorial exchanges with the Korean University Gallery as well as knowledge transfer and consultancy.

The Whitworth hosted the international University Museums Art Galleries Conference in 2008, which raised their international profile (it was at this event that the Koreans approached them about partnership) and frequently collaborates with other university galleries (for example the Henry Art Gallery in Texas State). This supports wider co-operation between the universities involved, in terms of research, education programmes etc.

The Whitworth's status as a university gallery is also a key driver of the active role it plays within local regeneration, for example: It is co-commissioner of the

Manchester Festival; it is involved in the (community generated) Public Arts programme (this led to collaboration with KAOS, a radical arts group working with Manchester teenagers); Manchester University is a partner in the Beacons Public Engagement Programme (for universities) and the gallery work with the North West Regional Development Agency via the 'Raising the Game' initiative, a funding programme which specifically aims to raise the profile (including international) and quality of local museums).

The Whitworth runs the '**New Contemporaries**' programme which provides a **high-profile showcase for art and design graduates** and has identified the potential for this **to develop into an international franchise**.

Museum of London www.museumoflondon.org.uk
(Interview with Jack Lohman, Director)

Jack Lohman is active in a range of international fora. In addition to being Director of the Museum of London, he is an advisor (on China) to UNESCO and a trustee of a museum in Warsaw. He suggested an area for discussion with UKTI, which was also flagged up by Dr Michael Dixon, was that there should be a UKTI strategy for the prioritisation of a few specific emerging markets. Jack Lohman proposed that a short list of 3 or 4 priority territories should be established. He suggested Brazil, China, Egypt and the Middle East should be prioritised by UKTI (see Recommendation C).

He also proposed that efforts should be made to encourage fact-finding visits in both directions from these priority markets and that this could be complemented by the offer of internships and placements with UK stakeholders, linked to more proactive marketing of relevant HE and FE provision in the priority countries.

Finally, he suggested that better communication between UKTI staff in priority countries and UK stakeholders would help to make the sector more aware of tendering opportunities and would produce measurable benefits for the sector.

National Museums' Directors Conference www.nationalmuseums.org.uk

As noted in the main body of the report, both the MLA and MA reported the majority of museums are largely locally funded and thus have a local focus which makes them less likely to develop international ambitions. However, both the British and Natural History Museums are members of the NMDC. This network includes most of the museums which have an interest or an active role in international activities. Dr Dixon is the current Chair of NMDC and believes a significant portion of the members of that group are interested in the international agenda and **stronger links with UKTI could facilitate progress** by:

'Re-defining and taking practical steps to develop the Conference's relationship with government departments and other organisations with an international remit, with a view to promoting greater collaboration' (NMDC report: 'International Dimensions')

“We also recognise that there are areas whereby greater dialogue and co-ordination within the NMDC and with others, the effectiveness and impact of our individual actions could further be increased” (NMDC report: ‘International Dimensions’

“Loan demand has also been fed by the global boom of new museums and gallery developments, many of which have limited collections of their own. For museums with high profile collections and the expertise to mount exhibitions, this presents numerous opportunities, in some cases with the potential to develop profitable sources of income.” (NMDC report: ‘International Dimensions’)

British Museum www.britishmuseum.org

No interview was conducted but other interviews such as British Council, Museums & Libraries Association (MLA) and Museums Association (MA) all suggested that the museum, like the Natural History, is a **“a major international player”** and referred to the fact that Director Neil MacGregor has turned around the museum’s fortunes (from a £5m deficit in 2002) through more entrepreneurial management, actively building international links, promoting cultural diplomacy and expanding the consultancy and research activities.

“A rolling re-display is transforming galleries, spectacular acquisitions have come in, and links have been forged through loans and touring exhibitions with museums from Gateshead to Tehran and Beijing”. (The Guardian)

“The aftermath of the Iraq war, and the cataclysm facing Iraq’s cultural heritage, proved his greatest opportunity. As bombs were still falling, MacGregor and his department head, John Curtis, were on the phone to Baghdad; the museum has since led the world in offering help, advice and support.” (The Guardian)

New Maritime Museum Antwerp www.mas.be (Interview with Director Carl Depauw)

This interview illustrated how partnerships can evolve into commercial opportunities for the UK. The establishment of a new flagship museum was an key outcome outcome of Antwerp’s status as the European City of Culture in 1994. During the construction of the museum Carl Depauw has been cultivating partnerships with UK museums, notably the Greenwich Maritime Museum, Liverpool Museum and the V & A. Not all elements of this partnership have a commercial aim and it is partly focused on knowledge exchange: *“The relationship has evolved into mutuality and real knowledge exchange and Knowledge Management links with Liverpool Museum.”*

The museum is due to open in 2010-2011 and the Director’s vision is for a more *“twenty first century approach to curating”*. This approach is typified by museums such as the V & A, which have established a global reputation for dynamic ‘re-visioning’ of exhibits in cross cutting exhibitions. The interview revealed that **the museum is currently in discussion with the V&A in London, about the design and delivery of a staff training programme on a commercial basis.**

3. Design Companies

Event Communications www.eventcomm.com (interview with Co-founder Celestine Phelan)

"I am not sure they [the UK government] fully understand what we [as a sub-sector] do and what, as small companies, we have achieved"

Event operates from offices in London and Dublin, and it is currently investigating the possibility of setting up a third office in the Middle East; it has delivered "over a hundred and twenty major projects around the world". The company describes itself as *'leading exhibition design group, recognised as a pace-setter for pushing the boundaries of existing practice and constantly exploring new ways to interpret, present and connect with audiences'*.

The company believes that to grow a significant market overseas, a local presence is essential. Investment in an overseas office is a major decision but that office and its staff will underpin any successful business in-country: *"It would be good if UKTI could give local advice to help our decision making."*

Celestine Phelan feels that Central/East Europe's extensive cultural and architectural heritage is largely untapped in terms of tourism and local economic development but recognises that there are immediate pressures on these economies. However, Event believes there is potential to cultivate contacts, build local knowledge in anticipation of better times ahead – Event is doing some work in Poland on the Jewish Museum. After attending the 2008 US Museum Conference she is not optimistic about immediate prospects in the USA citing *"lack of capital"* and *"corporate sponsorship"*, and a *"much more cautious approach to new museum projects, new capital projects in general, and (the funding of) ambitious exhibitions"*.

Event is **open to discussion with UKTI to explore how UKTI can make best use of local intelligence** in order to increase business opportunities for UK exhibition and design specialists. The UKTI newsletter and web site is considered *"too general"* *"....we are a specialised niche and most of the information made available is totally irrelevant to us"*.

"If we can help UKTI to raise awareness among their international offices - who we are and what we do - there is more chance of making productive links, facilitating visits to UK to meet practitioners or taking groups from UK to meet contacts (in-country)."

She suggested that **UKTI has a potentially valuable role through which it facilitates contacts and networking** and identifying opportunities *"to piggyback"* design partners onto larger construction-based contracts.

**Haley Sharpe www.haleysharpe.com
(interview Founder Bill Haley)**

Hayley Sharpe offers a full range of services to take projects from concept to completion, covering both Design Consultancy and Design/Build elements. The company describes itself as, *“highly experienced in participating in and co-ordinating with larger design teams that include architects, engineers and other specialists”*. The head office is in Leicester, with satellite offices in North America, Southern Africa and the Middle East.

“Over the years, we have developed a good understanding of regional and country-specific contexts and built up networks of locally based specialists and suppliers.”

The company has given individual Directors responsibility for different global regions, an approach which Bill Haley believes is an important factor in building the necessary expertise to provide a focused response to the requirements of any project.

“You can invest a lot of time and resources in negotiations that go nowhere. It is worth getting good local advice.”

The company has received support from the British Council for its overseas work and its account of this experience reinforced the message that staff continuity is an issue which both UKTI and the BC need to consider:

“We spent a lot of time in Saudi [pitching for a piece of work] and the BC were very useful on the ground advising and opening a few doors but then that person moved on and their replacement has never contacted us!”

Bill Haley felt the US market was depressed and that there had been a more cautious approach to capital projects since the credit crunch:

“A trustee of a major museum told me that until recently, once 60% of the capital was in place, a project would be green lit; now the target is more like 85%”.

Bill Haley feels that the **single most valuable service UKTI could provide would be to build the capacity of its in-country staff in order that they can identify opportunities** and communicate them quickly to the UK. Haley Sharpe reported a positive example of UKTI support (in Poland).

“If they (UKTI) can do more of this it would save time and money for tendering companies and help with new leads. But the issue is timing, usually there are only 4-6 weeks to turn around a complex document so they have to get that information out immediately”.

**Metaphor www.metaphor.eu
(interview Founder, Stephen Greenberg)**

Metaphor has an extensive international track record and it works in a number of ways, *"at every scale from cities to showcases, and at every stage of the visitor experience, from master-planning through to exhibition design"*

Stephen Greenberg, as do his peers, feels that developing overseas work was an important factor in sustaining his company and he sees the Islamic world as the possible main focus for future growth. He is very interested in commercial benefits, but also feels that the museums sector is **uniquely placed to foster positive perceptions of the UK** through enabling countries (especially in emerging markets) to view museums differently. i.e. not only in the context of tourism strategies but also as a way of expressing their own cultural identity and building their own capacity to articulate their culture through their museums and exhibitions. Unlike the other companies interviewed, Metaphor has not invested in an overseas office.

Stephen Greenberg is not a fan of what he described as: *"beauty parade"* trade missions but he feels that UKTI could work with the BC to **provide potential clients with well planned programmes of visits to UK companies**. *"For these to work they [UKTI/BC] need to be clear what their agenda is and design the programme accordingly. If they do, we would be happy to participate"*.

He also emphasised **the value of high level government-to-government dialogue as a vehicle for opening constructive discussions** which can lead to contracts or capacity building partnerships but he feels that not all embassies are taking a broad enough view of how these talks can be an instrument for promoting UK businesses and institutions.

"We are working on Egypt's biggest museum [The Grand Egyptian Museum will be one of the biggest in the world] and I feel that we have had no real support from our embassy. We are dealing with very senior people in Egypt – this is a very important project for them - but the ambassador didn't even contact us let alone offer to host a reception".

He suggested that UKTI could develop a much better understanding of the sector's support needs for its overseas work, by investing some time in **direct consultation with the UK's small group of design/exhibition specialists**.

4. Education and Training

University of Leicester www.le.ac.uk/ms

Interview with Richard Sandell, Head of the Department of Museum Studies

The university has an internationally diverse student body – 22 countries are represented on campus. It was selected by the Times Higher Education Supplement as ‘*University of the Year 2008*’.

‘For more than 40 years Leicester has played a key role in turning a field devoted to training museum professionals into a research field capable of shaping social and intellectual agenda, and encouraging a profession to rethink its role’. (Leicester University website)

Leicester University was frequently cited during interviews for the quality of the work undertaken by the Department of Museum Studies, and in particular, its ability to involve practitioners from the sector and attract an international student body. The university has established the Leicester University Museum Network which consists of over 100 museums with which the department collaborates, to ensure high-quality student placements and professionally relevant course content. The Department of Museum Studies has built an international reputation for conducting world class research *“the highest proportion of world-leading rated research, in any subject in any UK university (RAE 2008)”* on behalf of UK government bodies and museums such as The National Gallery.

The Department’s research focuses on:

1. The educational and communicative character of museums
2. The social agency of museums
3. The representation of disability in museums
4. The history of museums, objects and collections
5. Museum spaces and technologies
6. Scientific analyses of objects and collections
7. Cultural policy and politics
8. Cultural analyses of museums, objects and collection

Director, Richard Sandell is keen to establish more relationships both in the UK and internationally, in order to take this work forward. His department is working with the Smithsonian Institute in Washington to look at regionally focused models which address a region’s training needs. He believes that museum studies within local regions should and can reflect local and community needs.

Key skills gaps for the sector identified by the Museum Studies research are:

1. **Digital Heritage** - An M.A was introduced in response to a skills gap that was identified globally: a *“massive new development”*.

2. **Community Engagement** to support the offer of/enhance education and outreach work.
3. **Museum Exhibition Design** – There is a big export of short courses in collaboration with international architects, and courses on museum exhibition design. Land and Metaphor are two of the acclaimed design specialist companies that have worked with Leicester. They run masterclasses offering only 20 places per workshop.
4. **Marketing/Events** – Understanding audiences is of paramount importance – Leicester runs an ‘*understanding the press and media*’ course.

The department has identified the **key emerging international markets**:

1. **Middle East/Egypt/Abu Dhabi** which have made a major investment in new museums - “*They are desperate for training and research advice*”. The long-term plan is to devise a study programme that will meet these needs with an internationally recognised qualification.
2. **Taiwan** where Leicester is working to organise a conference in 2010. This has been developed over the last 15 years as a result of ongoing contact with alumni from Taiwan, who are working in the museums and galleries sector.
3. **South America** which has seen huge growth in the museums sector create new opportunities and new skills needs.

**Victoria & Albert Museum www.vam.ac.uk
(interview with Veronika Harris, Head of Training)**

The V&A is one of the UK’s major art & design institutions and it is a **field leader as an ‘employer’ provider of accredited vocational training programmes**

The museum is **running 6 ‘Creative Apprenticeships’ in partnership with Kensington & Chelsea College** (which provides the key skills element), with EDI plc accreditation and QCA approval – the relationship as EDI is particularly positive due to the fact that this awarding body is very flexible and open to accrediting new elements of programmes to address the changing skills needs within museum job roles – these new elements may then be used by other training providers. The Apprenticeships are run for 2 years as the V&A believes that this is the minimum time for them to be meaningful. Full details can be found at: <http://vamnvqcentre.co.uk/>.

An online training element (circa 50% of the course content) is included and the V&A has produced five DVDs. The V&A/EDI programme offer includes an Assistant curator’s qualification (which takes five years to achieve) and a new award in conservation – Veronika believed that there was previously a gap in the market for an up-to-date award in this area.

Veronika is strongly committed to supporting non-traditional routes to roles within museums and galleries which are usually taken up by (for e.g.) history of art graduates often don't have employability or relevant technical skills. She believes that **job roles within museums galleries are evolving and so people need more transferable skills.**

The V&A has been active internationally in the area of education and training: It took five years for them to develop 'excellence' in all the disciplines offered to match expectations of international students. She stressed that it is essential to take account of the institution's own organisational culture and that of client when designing programmes. It is also important to promote the concept of the museum as a community-based resource.

The V&A runs international programmes for both individuals and groups and these are tailored to meet specific needs. The museum's main international markets to date have been **the Middle East and the Far East (China) and India.** **Accreditation/qualifications are very important in some countries/regions** such as the Middle East where there is no work-based learning structure.

In the case of organisations, **training and consultancy is often focused on capacity-building** and delegations are commonly supported by overseas Ministries of Culture – for example, two representatives came from Azerbaijan to request the V&A's support with setting up a textiles museum.

The V & A markets its international programmes through Museums Association, the British Council, overseas ministries/cultural depts. and specific museums and galleries. **The museum has never worked with UKTI and would be interested to find out about the support which could be offered by UKTI's in-country commercial officers and Cultural Attaches etc.** The museum has no previous experience of European programmes but would be interested in exploring related opportunities. **Veronika Harris is particularly interested in working with Spain as she has knowledge of this market.**

North Hertfordshire College (interview with Fintan Donahue, Principal)

Since a re-organisation in 2006, NHC's structure has been based on six 'vocational academies'. Within its 'Centre for the Arts', **the college has its own gallery – the 'Michael Brown Art Gallery'** which forms part of the overall creative industries programme offer.

Though the College is just starting out in terms of international activity, **Principal Fintan Donahue was recently appointed as FE representative on the board of the new National Skills Academy for Creative and Cultural Skills.** Despite their demanding domestic agenda, the **UK Sector Skills Councils (via the Alliance of Sector Skills Councils) have committed to the development of an international strategy and the NSAs are seen as a key vehicle for taking this forward.** Fintan

confirmed that the focus of this study is very much in accord with the objectives of the NSA and **he would be keen to explore the way in which UKTI could lend support.**

Fintan believes that that **there is a lot of elitism in arts and heritage** and that this is compounded by the fact that initial entry often necessitates taking unpaid work in order to gain appropriate experience (especially if you do not have a relevant HE qualification):

“Only kids from privileged families can do it and thus, the supply chain through which all this is routed, is flawed.”

“Graduates are not coming out with the right technical and vocational skills and their degrees in specific subjects make them a one-trick pony.”

He also asserted that **a key issue is the multi-functional nature of today’s jobs within galleries and museums:** *“You need to have technical skills as well as working on things like education programmes – transferable skills – less a feeling of ‘this is my particular job’.”* Fintan’s college is strongly emphasising the multi-skilling approach in training people for work in this area as well as in the performing arts and he suggested that the PTLLS and DTLLS (which equip people for teaching in the Lifelong Learning Sector) should also be considered as valid qualification for working in museums/galleries. See: <http://www.lluk.org/2986.htm>

“We need more FE ambassadors to take these messages abroad and to look at the internationalisation of career development – the NSA wants to do this.”

Fintan pointed out that there **is currently no network for international exchanges to support curriculum and career development in the sector and he believes that such a mechanism would be very valuable.** He highlighted the fact that UK employers are also frequently not committed to continuing professional development (CPD) and suggested that some related pilots need to be run, perhaps within the UK in the first instance but with the potential to integrate an international dimension.

Fintan suggested that UKTI should meet in the first instance with the NSA college Principals group (which currently consists of Principals of the 12 founder colleges).

APPENDIX 2

Other research resources

Learning to Live Museums, young people and education - IPR/NMDC (2009)
Museums and Local Resources: a European perspective (report to European Parliament Culture sub committee) (2009)

International Dimensions - NMDC (2007)

Sector Skills Council International Strategy Forum Report (April 2009)

Creative Industries Economic Estimates Statistical Bulletin DCMS 2009

Creative Britain: New Talents for the New Economy

www.culture.gov.uk/reference_library/publications/3572.aspx/

How to market design consultancy services - Shan Preddy (2007)

Plan Estratégico de la Red de Museos Estatales (2004-2009), Sub-dirección General de Museos Estatales, Ministerio de Cultura

Cultural Policies and Trends in Europe

(<http://www.culturalpolicies.net/web/spain.php?aid=72>)

Cordoba Capital of Cultura (<http://capitalcultural2016.cordoba.es/>)

State on Stage: Best Practices of government support, Jun 2007

Ministry of Culture (<http://www.mcu.es/museos/index.html>)

www.mla.gov.uk/what/programmes/renaissance

www.mla.gov.uk/what/raising_standards/accreditation

www.living-places.org.uk/

<http://www.ccskills.org.uk/Solutions/CulturalLeadershipProgramme/tabid/79/Default.aspx>

www.haleysharpe.com

www.britishmuseum.org

www.vam.ac.uk

www.eventcomm.com

www.museumofbritishfolklore.co.uk

www.nhc.ac.uk

www.gcc.ac.uk

<http://www.lluk.org/2986.htm>

www.getty.edu/leadership

www.museumoflondon.org.uk

www.cassonmann.co.uk

www.ojec.com

www.timesonline.co.uk

www.landdesignstudio.co.uk

www.nationalmuseums.org.uk

www.metaphor.eu

www.le.ac.uk/ms

www.whitworth.manchester.ac.uk

www.tcch.ac.uk

www.ediplc.com

www.yale.edu

www.mas.be

www.culturalinnovations.com

www.merx.com

www.telegraph.co.uk

www.guardian.co.uk

APPENDIX 3

Some key examples of H.E. Museum studies and related subjects - United Kingdom. NB This is not a comprehensive list.

Bournemouth: [Bournemouth University: School of Conservation Studies:](#)
F/T MA Museum & Collections Management - Critical learning for museum professionals. The MA Museums Studies course is Museums Association and CHNTO accredited.

Ironbridge: [University of Birmingham's Ironbridge Institute:](#)
F/T MA in Heritage Management
(Recognised by the Museums Association and the Cultural Heritage National Training Organisation)

Leicester: [University of Leicester Department of Museum Studies:](#)
F/T MA, MSc, Graduate Certificate and PhD in Museum Studies
(Recognised by the Museums Association and the Cultural Heritage National Training Organisation)

Lincoln School of Architecture:
F/T BA (Hons) Design for Exhibition & Museums (3 years)

[City University Department of Arts Policy and Management:](#)
F/T MA, MPhil. & PhD degrees in Museum & Gallery Management, Museum and Gallery Management, Arts Management, and Arts Criticism, Postgraduate Diploma in Cultural Management - full-time, part-time and modular (Recognised by the Museums Association and the Cultural Heritage National Training Organisation)

London College of Fashion: www.fashion.arts.ac.uk
F/T & P/T MA Fashion Curation

Royal College of Art: www.cca.rca.ac.uk/docs/introduction/index.htm
F/T & P/T MA Curating Contemporary Art (Co-funded by Arts Council England and the RCA).

[University of Manchester Department of Art History:](#)
F/T & P/T MA in Art Gallery and Museum Studies
(Recognised by the Museums Association and the Cultural Heritage National Training Organisation)

[University of Newcastle, International Centre for Cultural Heritage Studies:](#)
F/T & P/T MA degrees, Postgraduate Diplomas and Postgraduate Certificates in Museum Studies, Gallery Studies, Heritage Education & Interpretation

(Recognised by the Museums Association and the Cultural Heritage National Training Organisation)

[University of Northumbria: School of Arts and Social Sciences:](#)

MA degree in Cultural Management

[University of East Anglia School of World Art Studies and Museology:](#)

MA in Museology; MPhil. & PhD by Research in Museology

[Nottingham Trent University:](#)

MA in Heritage Management

(Recognised by the Museums Association and the Cultural Heritage National Training Organisation)

[University of St. Andrews:](#)

MA in Museum and Gallery Studies

(Recognised by the Museums Association and the Cultural Heritage National Training Organisation)

[University of Salford, Centre for Heritage Studies:](#)

MA and Postgraduate Diplomas in Arts & Museum Management, Heritage Interpretation, Presentation & Design, and Museum & Heritage Exhibition Design

[University of Southampton, Winchester Campus:](#)

MA Museum Studies: Culture, Collections & Communication

UAL Chelsea School of Art

Art Handling and Installation (short course)

Westdean College, Chichester

Professional conservators in practice - Art and Object Handling (short course)

APPENDIX 4

Programmes offered by FE colleges

National Vocational Qualifications (NVQs) are competence-based qualifications which can be achieved by full-time employees or by school and college students with a work placement or part-time job which enables them to develop the appropriate skills. Colleges do sometimes include NVQs within their offer to international (employer) clients as well as full-time students as delivery models are flexible.

Foundation Degrees are particular types of degrees which are designed to equip students with the skills and knowledge sought by businesses in specific sectors. They can offer a route into higher education. Study modes are flexible and options include through distance/online learning. It takes around two years to complete a Foundation Degree full time, or three to four years part time. The qualification is broadly equivalent to the first two years of a bachelor's degree and progression from FDs which are designed in collaboration with businesses) can be to a job or to Higher Education, which makes them popular with international students. The UK FE sector sees FDs as one of the key areas for international business growth in the coming years, although it will be some time before concrete benefits resulting from the legislation which gave colleges FD awarding powers.

PTLLS (Preparatory Cert for Teaching in the Lifelong Learning Sector) + DTLLS (Diploma in Teaching in the Lifelong Learning Sector) are relatively new qualifications for initial teacher training and (together with some special focus options) for continuing professional development. They are linked to national standards set by Lifelong Learning UK. Some FE colleges have been using these for 'trainer-training' contracts with overseas clients.

Some examples of courses which are specifically relevant to the museums and galleries sub-sector run by FE colleges are detailed below. NB This is not a comprehensive list.

It should be noted that some private learning providers also offer relevant courses and that Creative Apprenticeships are frequently led by the employers themselves.

Cornwall College

Heritage Care and Visitor Services NVQ Level 2

Cultural Heritage Operations NVQ Level 3

Cultural Heritage NVQ Level 4

Tourism (Heritage and Culture) Foundation Degree

Oaklands College
Creative Skills Apprenticeship at Level 2

Askham Bryan College
Cultural Heritage NVQ Level 2

Greenwich Community College
Travel & Tourism Services (Guiding) NVQ 2 & NVQ 3 – Heritage focus

City of Bath College
Heritage Management Foundation Degree

Sheffield College
[Tourism and Events Management Foundation Degree](#)

Truro College
[History, Heritage and Archaeology Foundation Degree](#)
Industrial Heritage Tourism Certificate of Achievement

Tamworth and Lichfield College
Heritage and Culture Foundation Degree

Craven College
Heritage and Conservation in the Built Environment Foundation Degree
Heritage Construction Skills (10 weeks, non-accredited)

Macclesfield College
Arts and Cultural Heritage Foundation Degree

Blackpool and the Fylde College
History and Heritage Management Studies Foundation Degree

Cirencester College
Environmental Conservation and Heritage Management Foundation Degree

Chesterfield College
Tourism, Heritage and Culture Foundation Degree

Nottingham Trent International College
Gallery, Museum & Heritage Management Graduate Diploma (University of Nottingham)

Writtle College
Contemporary Issues in Heritage & Tourism (HE Credit Bearing)

APPENDIX 5

Spanish Research Report - Policy Context

In 1978 the Spanish Constitution introduced a model for the regional devolution of power, comprising 17 regions and two autonomous cities. This included three levels of government: central, regional and local, with the Ministry of Culture having responsibility for central government cultural policy and the development of cultural activities to promote social cohesion, regardless of any economic gains. However as all three levels of government have some responsibility for cultural development and policy, this can result in uncoordinated and sometimes duplicatory initiatives in regions and cities. There is also evidence to suggest that culture is still used as a political tool by the parties to attract or reward grass-roots supporters.

The regional government has autonomy with regards to cultural provision and cultural policies, and in general the political significance of culture and thus, the input of regional governments into cultural affairs is greater in regions that have their own language and cultural values such as Catalonia, Galicia and the Basque region. This type of federal government structure means that resources tend to reflect the political power of a region, with Catalonia receiving greater support for culture than Spain's largest region, Andalucía.

In 2005, public expenditure on culture accounted for approximately 0.56% of the Spanish GDP. In the same year, central government spent 180million euros on the large museums, while the regional governments spent 158million euros. There are more than 1000 museums in Spain; 140 are owned and managed directly by central government, including the most influential institutions such Madrid's Prado and the Reina Sofia Museum and Art Centre. In some cases, operational responsibility for National Museums is delegated to regional governments while the remaining institutions are managed and funded by regional, and local government, the church and private institutions.

Cultural Institutions Modernisation Plan

There is a widely held view in Spain that the management of museums needs to be modernised and that the museums are over-dependent on public sector funding. In 2007, central government introduced the *Cultural Institutions Modernisation Plan*, which aimed to modernise national museums and to encourage more diverse revenue streams and a more professional approach with clear objectives and transparent selection processes for national Museum directors. This legislation gave rise to the piloting of a more autonomous management model by the Prado Museum, the National Library, the Reina Sofia Museum and Art Centre and other national museums and galleries. It seeks to encourage non-political appointment of directors and greater revenue generating freedom than the law previously allowed. However, the system for the appointment of museum directors in less prestigious institutions in regional and local areas remains largely unchanged.

Ministry of Culture - Strategic Plan for Museums

Central government is currently implementing a Strategic Plan for museums managed by the Ministry of Culture. The objective of this 5-year plan (2004-2009) is to strengthen the link between museums and the communities they serve. The overall aim is to redefine the role of state-owned museums and the plan has a strong focus on staff development via training. However, it is not yet clear who is running the training program and there is little evidence of its impact in Malaga. The program aims to implement or improve the following:

- Training in overseas for professional staff in museums
- Management
- Conservation of cultural heritage and museums
- Exchange programs abroad (mobility) for museum staff
- Customer services
- Security

Malaga – examples of international collaboration undertaken by the museums interviewed

Malaga is typical of many Spanish provincial cities; there are few private sector companies operating museums in the Museum sector and those which do depend almost entirely on public funding (regional, provincial and local). This support is often in the form of some kind of subsidy rather than being offered via a fully commercial contract.

However, a number of new small companies are emerging in Malaga which are hoping to exploit the potential opportunities generated by growing number of infrastructure projects relating to new cultural activity in the city, such as the building of a new auditorium and the conversion of a former tobacco factory into three new museums which will open in 2010. It will however, be very **difficult for overseas companies to enter the local market, unless they are invited by local companies** to join a partnership in the form of a 'UTE' – a Temporary Partnership of Businesses.

The interviews in Malaga highlighted the fact that it is only those museums which are managed by the private sector which have developed international links with institutions abroad and in some cases, they have been project partners. These are **collaborative partnerships rather than commercial arrangements** but there may be scope for the partnerships to evolve in the future. One example is **the Centre of Contemporary Art Malaga which has an agreement with the Serpentine Gallery in London** for the exchange of information about raising finance for temporary exhibitions and improving management practices. **The Centre also provides placements to Erasmus students from the University of Coventry.**

The company that runs the **Interactive Music Museum** has signed an agreement with **Liverpool National Museum** for production support in relation to an exhibition about the history of music, as part of a European funded project.

The Artnatura museum will open in Malaga in late 2010 and will house one of the largest gemstone collections in the world. The management of this ambitious new museum is based on an international partnership and may thus be more **receptive to exploring the global market for specialist services** and support. Artnatura has coordinated temporary exhibitions at the Budapest National Museum (in Hungary) and in the capital of the United Arab Emirates. **The management has also expressed an interest in contacting the Natural History Museum** in London, as this institution could offer extensive expertise in cataloguing, conservation and exhibitions.

While most interviewees acknowledge a variety of skills gaps and the need to address them via training, only ArtNatura (which is still being built) has a budget for staff development. The Malaga research also identified a wider issue relating to organisational culture in Spain: **Staff training is frequently seen by companies (and the public sector) as an expense rather than an investment** or as a service which should be provided by the government at no charge.

A few market opportunities for the UK

As mentioned above, there are currently a number of infrastructure projects in Malaga relating to cultural activity: the new auditorium and the conversion of the Tobacco Factory as well as the extension of the Centre of Contemporary Art, a Maritime Museum and the development of the port and seafront area. In theory, related contract opportunities should be accessed via open competitive tendering processes which accord with EU regulations. In practice however, Spanish companies (especially the local ones) will be well-positioned to bid and win these contracts, partly because of their local knowledge but also (potentially) as a result of political pressure for local job creation due to the high rate of unemployment.

If non-Spanish companies are interested in submitting joint tenders with Spanish companies, they will need to be prepared to invest time in negotiating a UTE, which, as described above, may be a substantial commitment involving scoping visits and obtaining legal advice etc.

One 'case study' which demonstrates that the Spanish/Malaga region market is not completely impenetrable, is the recent signing of a collaborative agreement signed between Promalaga (Malaga City Council's economic development agency) and Collage Arts in the UK which manages the Chocolate Factory, a Creative Industries training and incubation project in North London. Under this agreement, Collage Arts (<http://www.collage-arts.org/collagearts/collagearts.php>) will provide support to Promalaga with the development of its first creative cluster initiative in 2010. The service contract will include the provision of specialist consultancy, advice and training for a period of 12 months.

Promalaga is in the process of finalising the funding package required to deliver this collaborative project. However, although this is an example of commercial activity it should be noted that the development of the Collage Arts-Promalaga partnership (which was brokered by Otravista), has been a slow process and has involved a number of meetings, visits and exchanges over a period of more than two years.

Conclusions

The research findings support the assertions of many interviewees that Europe is a difficult market because in many nations the resourcing of museums is politicised and somewhat parochial. In Spain, the supply chain for the museum sector is relatively strong in cities such as Madrid, Barcelona, Valencia and Bilbao where a number of private companies offering specialist services for large national and private institutions have emerged, but this is not the case in other cities and regions.

However, even in the cities with an established supply chain, the Spanish market can still be challenge for foreign companies wanting to gain access. The research indicated that **the requirement for the formation of a UTE** – a Temporary Partnership of Business with a local company – can be a **significant barrier for overseas companies. This is perhaps, an activity with which UKTI's local offices could assist.**

On a more positive note and as highlighted above, things are changing as a result of the *Cultural Institution Modernisation Plan*: for example, in Barcelona a public-private consortium has been established which comprises Barcelona City Council and the government of Catalonia and private sector organisations. This consortium has established the Barcelona Contemporary Art Museum Foundation to modernise management practice and to raise funds to expand the collection of the Barcelona Contemporary Art Museum. **These new models should offer scope for institutional partnerships, but no immediate commercial prospects.**

In general, museum management in Spain remains very traditional in approach, especially outside Madrid and Barcelona. Dependence on public funding and political appointments to senior posts in culture departments and museums has resulted in **the sector being largely run by public officials without sector-specific qualifications or experience** and often with limited management skills and no training budgets: **Only one of the museums and art galleries interviewed had a budget for staff development.** It is also rare for museums to invest in visits by their management teams to other countries (or even other Spanish cities) to learn from different management and curatorial approaches.

In Malaga, there has been significant growth in the number of new museums since the inauguration of the Picasso Museum in 2003, but there is little evidence to suggest there is a coordinated vision for how this expansion is integrated into the city's bid to become European City of Culture 2016.

Most new museums are small and are frequently based on public-private partnership arrangements: The local authority provides publicly owned premises to a private company on favourable or free rental arrangements. The quality of the exhibits and the visitor experience does not seem to be a factor in these arrangements, which presumably, may often be politically motivated.

There are more positive examples of the public-private model such as the Centre for Contemporary Art in Malaga. A private company, Gestión Cultural y Comunicación, has managed the centre since its inception in 2003 and has succeeded in bringing some of the most influential contemporary artists to the City. As a result, the company successfully negotiated a new contract for €28.5m for the period 2008 to 2017. However it appears that its current priority for investment is the development of the centre's collection.

Another private venture is the Art-Natura Museum which is due to open in 2010. This will have a training budget of €300,000 during its first year of operation and €100,000 for each subsequent year. The Museum will employ circa 100 people who will require training as guides, security staff, managers and volunteers. **The museum has already made contact with some UK institutions to request advice on conservation and display of exhibits and there may be opportunities for commercial contracts in the near future.**

Significantly, one interviewee suggested that some government level dialogue between the UK and Spain would perhaps raise awareness of issue such as how a proactive approach to professional development within the museums and galleries sub-sector and the wider creative industries (to include a focus on transferable skills), might help to combat unemployment - this is a high priority for the Spanish government at all levels. The same interviewee asserted that visits from high profile figures from UK galleries/museums (such as Nicholas Serota from the Tate) might help to convince Spanish politicians of the benefits of investing in the sector.