Music Sector Review

Final Report for Creative Scotland

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Executive Summary

Introduction

This review has taken in the full spectrum of Scotland’s music and the music sector - across genres, across commercial, cultural and educational spheres, live and recorded music, amateur and professional performers and organisations and from both Scottish and international perspectives.

It has drawn upon individual interviews with people representing all facets of the sector, on a survey of individuals and organisations, on available documentation and research from Scotland and the UK and on information provided by Creative Scotland and their invited Steering Group.

Key Findings

The overall picture is of a healthy music scene with a determination to succeed and prosper despite an honest appraisal of needs and shortcomings. Vitality, talent and commitment all ensure that music in Scotland continues to be - as it has always been - a force to be reckoned with.

Since devolution music has received increasing attention for its value as a creative industry as well as for its cultural importance. A national policy overview for music specifically (rather than cultural and creative industries in general) would be beneficial and help propel the music scene further.

The Music Sector in Scotland

There are over 10,000 people employed in music in Scotland - over 40% as freelancers or working in approximately 400 relatively small businesses. Earnings and business turnover, on average, are not high. Funding and investment, especially in talent and breadth of provision for audiences, is weaker than in the recent past due to changing marketplace factors, especially for recorded music, and economic cutbacks, particularly for the subsidised sectors.
Public engagement with music is encouragingly high, particular in terms of participation in music-making across every style and genre of music from pipe bands to classical choirs.

Audiences for live music are relatively buoyant, despite the constraints on the nation’s disposable income in difficult economic times. The breadth of audiences across the population is not as wide as it might be and more audience development work is still essential.

**Music Performance**

Provision of orchestral music, funded directly by the Scottish Government and the BBC, is substantial (although not necessarily evenly spread geographically). Scottish traditional music, growing constantly in confidence and popularity, is thriving but still deserves wider acknowledgement as the music that carries Scotland’s core identity.

Scotland is well-served in general by the range and geographical scope of music promoters - and the venue stock is generally good. The breadth of provision for audiences, however, is limited in some areas - especially the minority interests such as contemporary classical and world music and jazz, in which the lack of promoters was particularly noted. The proliferation of music festivals in recent years has offered a lot to audiences around the country but there is a concern that in some cases a concentration of support for festivals might constrain the building of diversity and interest in different areas of music through regular year-round provision.

The limitations on core support funding for venues and promoters from public bodies - chiefly national and local government and, of course, Creative Scotland - has become an inhibition to more diverse and adventurous programming and provision - and to the diversity of Scottish-based bands and ensembles that can be supported as well as repertoire that can be performed. So, too, has the lack of a touring framework which, if one were to be carefully developed, could address some of these issues (and the review concludes with a recommendation that touring provision is re-examined).

**Recorded Music**

Challenges facing the recording industry are global, not local, but the Scottish industry has some resilient small labels (in rock, pop and traditional music) and good
recording facilities. Creative Scotland is unique amongst UK public cultural agencies in investing in recordings - as far as it can - but the overall difficulty of investment in artists’ development by record labels is a major inhibition to future growth. Scottish broadcasters and other media provide insufficient support and labels also encounter weaknesses in the fields of distribution, retail, promotion and marketing.

International Issues

Independently and through organised support, Scotland's music sector is energetically active on the international scene, promoting and showcasing Scottish talent as well as representing Scotland in international networks.

Concerted and sustained support for music internationally is essential for health and growth and for impressing the attractiveness of Scotland as a cultural destination on the rest of the world. Public enterprise, tourism and cultural agencies (especially Creative Scotland) and music-specific organisations are all contributing significantly to international activity but without a coherent strategy. Creative Scotland is well-placed to draw together a collaborative international strategy for music, to be operated with appropriate specialist partners, and thus to maximise long-term impact and benefit.

Music Education

Music education is of intense interest and importance to the entire music sector. There are fundamental concerns that provision in the state education sector is weakening due in part to increased charging for instrumental tuition and inconsistent levels of provision and standards (and there are also criticisms of the music curriculum). Nevertheless, there are very strong examples of local authority provision in some areas of the country and the informal sector's music education work - by community-based and performing arts organisations - has been constantly offering more and better ancillary opportunities (including lifelong learning for all ages as well as young people).

The national youth music organisations are thriving on the talent of Scotland’s young musicians but not all of the organisations are accorded the necessary stability and recognition of their national (and permanent) status.

The government-sponsored Youth Music Initiative has now been operating for ten years and is widely judged to be successful and highly beneficial. The Youth Music
Initiative is well-placed to capitalise on its achievements and accumulated experience by opening the next phase of youth music development with a renewal of the original review of the entire sector and by taking the lead on a sustainable national strategy for the next ten years.

**People in music**

Individuals - their commitment, skill, talent, expertise and experience - are at the heart of the music sector. Natural artistic talent thrives and it is the responsibility of the educational and organisational wings of the sector to support and help talented artists to develop. The substantial cadre of volunteers in promotion and event management are a valued element of the scene and they deserve help in dealing with increasingly professionalised issues.

Vibrancy in music promotion and project work is often in the hands of key individuals - producers, directors, managers and administrators. Scotland’s best and most inspired individuals in these roles are of an international quality and standing - but there is a clear need for career opportunities and training to enable others to follow in their footsteps in these leading roles. There is a concern that such opportunities are not sufficiently available at present.

**Support for Music**

Knowledge and insight about the music sector in the general public agencies is variable and may often need assistance and advice from specialists. Agencies dealing specifically with music - and in particular Creative Scotland - have considerable specialist skills and knowledge at present but their specialism must be maintained and sustained in future generations. So too must authoritative positions for music within their agencies, in order to have sufficient impact and influence with others. The need for a degree of independent expert assessment - as deployed by the government for the orchestras and other national companies - may need to be revisited by Creative Scotland and other agencies.

Agencies and network dealing with music - across areas of music and administration or dealing with specific genres - are performing valuable functions. Their specialism and commitment to their area of work is an essential strength and their independence should therefore be maintained. Nevertheless, there are areas of unnecessary overlap and also gaps in provision that could be rectified by Creative Scotland taking the overview and clarifying defined and complementary roles. To
be effective in the long-term these roles should then be recognised as permanent and national - and a coherent understanding and consistent set of messages could be developed by them on behalf of the music sector as a whole.

Final Comments

This review ends with a series of more detailed conclusions on the issues outlined in this summary. These conclusions lead to a series of recommendations for action and activity that, the review proposes, would strengthen the strategic and practical impact of Creative Scotland’s work in music, to the benefit of the whole sector.
1. Introduction

This report presents the findings of a review of music in Scotland, conducted on behalf of Creative Scotland. It is one of a series of sector reviews, and is intended to provide an overview of music in Scotland together with suggestions for future activity that will help the ongoing creative and economic growth of the sector.

1.1 Background

Why music matters

Of all the artforms, music is the most pervasive, and is arguably the form of artistic expression that resonates most strongly with people across all ages and social groups. Music is quite literally the soundtrack to our lives. It is an integral part of our everyday experience and of the major celebrations and rituals that mark the passage of our lives. It is a central part of our individual and collective memories, and is both a part of and a vital expression of our culture and our identity.

We live our lives surrounded by music – in shops and restaurants, on our radios and even now on our phones. We learn about music in school and hear it at home and music is a regular part of our social lives. Whether as audiences or participants, music pays a hugely important role for all of us.

A nation’s music is also a highly accessible and recognisable expression of its identity in a global context, as well as being an economically important industry generating substantial export revenues and supporting employment within and beyond the sector itself.

Scotland and music

Scotland’s music and Scotland’s music sector has always been a force to be reckoned with. Charting the influence of a John Martyn, an Alexander Gibson, a Franz Ferdinand, a Hamish Henderson, a Sally Beamish or a Tommy Smith has never been difficult. Policy-makers’ awareness of the structures and interventions needed to support their successors in an increasingly global music environment was, until relatively recently, far more limited.
The period since Scottish devolution has seen a remarkable advance in the private and public sectors’ appreciation of the realities of the music sector overall and of the music industry. From a position in the 1990s when the Scottish Arts Council supported only classical music, a little jazz and a smattering of traditional music and had no place whatever in music education or international relations - and neither government departments nor development agencies took any account of what was already a successful but marginalised commercial industry - the point reached today, exemplified by Creative Scotland’s extensive brief for this review, is already an achievement to be celebrated.

Indeed, one of the most important headline findings of this review is that the sector is in generally good health in Scotland, and has developed enormously in both cultural and economic terms over the last 20 years. In particular we have found that the quality and range of musicianship in Scotland is extremely strong and, in marked contrast to the recent past, more and more internationally successful artists are choosing to stay in Scotland. The live music scene is very vibrant and there are more than 160 dedicated music festivals held across Scotland each year.

We have also found many examples of productive partnership working across the sector and with other parts of the arts and creative industries, and have witnessed the development of an infrastructure that is more extensive and robust than it was in the past. The extent and range of music education in Scotland has increased dramatically both through mainstream provision and the substantial impact of the Youth Music Initiative; and examples from Edinburgh International Festival and T in the Park to Celtic Connections and the St Magnus Festival demonstrate music’s critical role as a driver of tourism.

This is also a sector that is increasingly international in its reach and ambitions. The growth of Showcase Scotland as an international event and the success of Scottish acts at South by Southwest are evidence of this increasing confidence; as are tours overseas by classical and jazz groups and ensembles.

That is not to say the sector is without its issues and challenges, as identified in this review. However, it is important to keep sight of the progress that has been made, and of the quality, richness and diversity of music in Scotland. In fact, the significance of a review at this time is precisely that it encompasses the entire music sector. It signals the inclusive perspective that Creative Scotland is empowered to
Review of the Music Sector: Creative Scotland

take on the cultural and creative economies, especially in a field such as music in which the two are inextricably intertwined.

1.2 Review purpose and objectives

The purpose of the study is to conduct a thorough review of the music sector in Scotland. More specifically, the brief identifies the following objectives:

- provide an overview of the cultural ecology of music;
- inform Creative Scotland’s future priorities; and
- provide a basis for strategic commissioning of external entities to provide service provision which could replace and/or complement existing programmes and services.

1.3 Review process

The review was conducted in the first half of 2012 and comprised a number of overlapping stages:

- an initial meeting with the Review Steering Group (see Appendix 1 for membership) helped clarify the remit and approach;
- collation and analysis of a range of existing data and research to provide an overview of the music ecology in Scotland (summarised in Chapter 2);
- one-to-one and group discussions with 99 individuals across the whole spectrum of music in Scotland – professional and amateur;
- an online consultation form (questionnaire) promoted via a range of music related organisations such as the Scottish Music Centre, Scottish Music Industry Association, Traditional Music Forum and Creative Scotland. This elicited a total of 186 responses (see Appendix 3);
- analysis of the online and consultation feedback; and
- three meetings with the Review Steering Group to feed back initial findings and inform the review process and recommendations.

We have drawn upon all of these to present our findings.
1.4 A guide to reading this report

In Chapter 2, we summarise pre-existing policy and data information to give an ‘aerial view’ of the position of the music sector in Scotland.

Rather than present the findings of each aspect of the review as separate sections, we have instead drawn upon the outputs of all of the research, consultations and survey work to present our findings according to a set of emergent thematic areas. Chapters 3 - 8 summarise these findings, covering:

- making and performing music;
- recorded music;
- internationalisation;
- music education and youth music;
- people in music; and
- networks and agencies.

We then draw a set of broad conclusions and suggest areas for further development and/or support.
2. Putting it in context

2.1 What is the music sector?

Defining the music sector is notoriously difficult, comprising as it does a complex mix of genres, functions, ‘supply chain’ activities and areas of interest. For clarity, this review considers the music sector in Scotland to comprise:

- live music (including professional, amateur, and community/ participative music);
- the recording industry; and
- music education.

There are, of course, activities such as retail and manufacturing which are connected with these central elements of the music sector, but they are only within the remit of this review in respect of economic data.

Both live music and the recording industry depend on a supporting infrastructure that includes artist and organisational managers and agents, promoters, producers, publishers, broadcasters; performance and rehearsal venues, recording studios, sound engineering and technical other facilities and services; and professional services in areas including marketing/ PR and legal services.

The music sector (live and recorded) spans all genres of music from classical music to hip-hop. Styles and genres of music mix and mingle constantly but for brevity and simplicity our references in this review try to keep to a simple set of well-understood basic categories such as rock, pop, classical, chamber, jazz and traditional music.

The sector embraces organisations that are purely commercial - profit-making enterprises that are generally covered by the term ‘music industry’ - as well as those which are in receipt of public support - the ‘cultural’ or ‘not-for-profit’ or ‘subsidised’ sector. As with genres, there are plenty of organisations and musicians who weave in and out of both.

This review also considers the role and position of music in education, covering the teaching of music within the school and tertiary sectors, informal music education - i.e. not within the statutory sector - and ‘youth music’, i.e. provision for young people.
2.2 Policy context

Music falls within the broad remit of cultural policy in Scotland, but also within economic development policy as it relates to the creative industries. In addition, the successful operation of a music sector in Scotland is affected by policy in a wide range of other areas, some of which are powers reserved by the UK Government. These include policy in relation to, *inter alia*:

- education (devolved);
- licensing (devolved);
- health and safety (devolved);
- policing (devolved);
- broadcasting (reserved);
- taxation and fiscal policy (reserved); and
- copyright and intellectual property (governed by European law).

**Cultural and Economic Policy**

Scottish Government policy is driven by the stated purpose to:

>“focus government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth”

In terms of cultural policy\(^1\), the Scottish Government aims to:

- promote and develop the crucial role of culture and creativity in making the strongest contribution to sustainable economic development;
- focus on the contribution that culture can make to improving the health, wellbeing, confidence and quality of life for Scotland’s communities; and
- raise the profile of Scotland at home and abroad, and ensure that as many people as possible in Scotland and overseas are able to benefit from, be

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\(^1\) [http://www.scotland.gov.uk/Topics/ArtsCultureSport/arts](http://www.scotland.gov.uk/Topics/ArtsCultureSport/arts)
inspired by and enjoy the very best of Scotland's creative and cultural offer.

Cultural policy is also delivered through Creative Scotland, established through the Public Service Reforms (Scotland) Act 2010. The Creative Scotland Corporate Plan sets out the organisation’s ambitions to develop a new model of cultural development. Specifically it sets out five objectives:

- to invest in talent;
- to invest in quality artistic production;
- to invest in audiences, access and participation;
- to invest in the cultural economy; and
- to invest in places and their contribution to a creative Scotland.

The Plan also defined three overarching or cross-cutting themes that inform all of the work of Creative Scotland. These are:

- equalities;
- international; and
- education.

Creative Scotland is also a key member of the Scottish Creative Industries Partnership (SCIP), the main vehicle for developing policy and co-ordinating activity in relation to creative industries development.

**Economic Policy**


This strategy identified four priority objectives aimed at addressing barriers to growth:

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3 *Government Economic Strategy for Scotland*, Scottish Government
to improve Scotland’s competitive position at UK and international levels;

to build the scale of businesses, business activity, skills and investment;

to attract business activity, businesses, skills and investment to Scotland; and

to develop creative leadership and build the talent base in Scotland.

SCIP and the agencies it comprises have primary responsibility for delivering against these objectives, and a series of industry reference groups provide the Partnership with industry specific advice and input. One of these groups is focused on music, and it published its recommendations in February 2011. The group identified seven recommendations for growing (or even sustaining) the music industry in Scotland:

- shared ambition and co-ordinated action between the industry and the public sector;
- increase scale, capacity and commercialisation;
- improve international competitiveness and access to market;
- improve access to finance;
- improve industry skills base;
- improve access to market intelligence; and
- measure success.

There are two points to make regarding this brief summary of policy priorities for music in Scotland. The first is that cultural policy is broad, and does not address specific priorities for music – that indeed is the purpose of this review. The second point is that where specific priorities are identified for music (e.g. by the Music Reference Group) they are focussed on economic development objectives, and have less to say about artistic and cultural development. In fact, there is a persistent gap in Government policy around music, underlying the timeliness of the current review.

Of course, some of the policy issues that affect music relate to other areas of concern (such as licensing or fiscal policy) and require a music-based response such as those made by UK Music to the UK Government. There is no comparable body specific to Scotland, lobbying and engaging the Scottish Government on the...
broad range of policy issues that impact on the growth and development of music - a situation that is addressed later in the review. This, of course, is something that would require further thinking in the event that Scotland becomes politically independent from the UK.

Our consultation found that the sector is generally unaware of any policy for music in Scotland. In fact, many commented on a lack of clarity around cultural policy more generally and felt that Government paid limited attention to the needs of the music sector when considering priorities in other areas. For example, many drew attention to the Canadian and French approaches to broadcasting and to fiscal policies that provide tax incentives to musicians and creative industries. While Creative Scotland and other have lent important support to debates around tax credits in areas like film, TV and computer games, the Scottish Government has limited scope to enact such policies under the terms of the devolved settlement.

There is, however, clear scope for the Scottish Government, working with key agencies such as those in the SCIP, to develop a robust music policy for Scotland. This policy should recognise that market forces will simply not support certain kinds of music and that there is a case for support on the basis of the availability and accessibility of diverse and high quality musical experiences as a public good.

Such a policy will also need to take a broad stance across a range of policy issues covering economic, social, cultural and educational policy.

The successful delivery of a music policy in Scotland may also require a degree of flexibility on the part of some of the main public agencies. In particular, music (as discussed later) is economically complex and does not follow traditional growth trajectories, requiring more flexible approaches on the part of agencies charged with promoting economic development. Similarly, for those more concerned with cultural development, the sheer diversity of music in Scotland presents challenges for prioritisation and equity of opportunity. Striking the right balance will require many of the key agencies in the SCIP to move towards the edges of existing practice and remits to deliver effectively for Scotland music sector.

2.3 Music sector in Scotland: overview of data

Sourcing robust and comprehensive information on the scale and structure of the music sector in Scotland is problematic. Official economic statistics provide poor
coverage of the sector with activities often hidden within other categories of economic activity or missed altogether due to the freelance nature of much music-related work patterns. While this is an issue that affects all of the creative industries (and other parts of the economy) it is particularly acute in music.

In this review we have had to make use of a selection of pre-existing data sets to examine the economic value of music as a creative and cultural industry as described in this section. In particular, we have relied heavily on data from Creative and Cultural Skills, which combined primary research with existing official economic data to arrive at more meaningful estimates than would otherwise be available. However, these sources remain imperfect, and the lack of reliable data to describe in detail the music industry in Scotland is a barrier to more effective policy, an issue we return to later in the report.

We have also included some of the available figures for other overviews, such as the level of participation in musical activities within Scotland, in more detail in subsequent sections.

The information presented here has been drawn together from a review and analysis of data provided by Creative Scotland and its partners, as well as publicly available information. Overviews considered in this section are:

- music - the creative and cultural industry - this embraces all areas of the music sector (excluding education) which generate work and economic activity
- the music market (audiences and participation are also touched upon here but are considered in more detail later in the report); and
- funding support for the sector.
2.2.1 Music industry – economic scale and structure

UK Music Industry

According to previous research by Creative & Cultural Skills (CC Skills), the UK music industry employed 124,420 people in 2010. This includes those involved in:

- live performance;
- production, retail and distribution of musical instruments and audio equipment;
- retail and distribution of recordings;
- recording;
- composition of musical works and music publishing; and
- promotion, management and agency related activities.

Live performance is by far the largest employer, with just over 51,000 directly employed in this area (41% of the total). This is followed by production, retail and distribution of musical instruments and audio equipment (27%).

In common with much of the creative sector, the music industry is strongly concentrated in London and the South East of England, which together account for 40% of total employment in the sector.

The UK music industry contributes around £3.9 billion to Gross Value Added (GVA) to the economy. The majority of this is generated through production, retail and distribution of musical instruments and audio equipment (48%), followed by live performance (20%) and recording (16%).

The industry is also a strong export earner. In fact, the UK is one of just three countries in the world which collects more in music royalties from abroad than it pays out to foreign rights holders. The other two are the USA and Sweden.

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5 The data presented here are drawn from work by Creative & Cultural Skills (CC Skills), and differ from official economic data on the music sector. In particular, the data are different to those recently published by Creative Scotland in its Economic Contribution study. The Economic Contribution study is based on official economic data, which are known to under-represent the music sector. For this reason, we believe that the CC Skills data provide a more complete analysis of the music sector.

6 Creative & Cultural Skills, Music 2010/11.

7 Scotland’s music festivals show rapid growth, BBC News, March 2012 (data from PRS for Music).
The music sector is characterised by high levels of self employment, freelance and part time working. 36% of the UK music workforce is self employed (30% in Scotland), and a third of employees (33%) work on a part-time basis (45% in Scotland).

It is also a young, well qualified workforce – 42% of those working in the UK music sector have at least a level 4 qualification and more than half of the workforce (54%) is under 40 years old.

Average earnings in music are low. In the UK, 39% of people involved in the sector earn less than £10,000 per annum, with 5% earning more than £41,000. 84% of part-time workers earn less than £10,000 per annum, and there is a high incidence of second jobs within the industry.

The music industry in Scotland

A recent report by CC Skills provides data for the music industry in Scotland (2010/11)⁸:

- there are **399 music related businesses in Scotland** (13% of the creative and cultural industries - CCI) - 98% have less than 50 employees;
- **10,790** employees (19% of the total CCI) are involved in music, the second largest sub-sector employer after design (28%);
- 90% of music businesses have a turnover of less than £1 million (93%); and
- there were **63 new start music-related businesses** in Scotland in 2010/11 –the fourth highest of the CCI, after design, craft, and literature.

### 2.2.2 Music market

The UK is the world’s third largest music market, and the market for music in Scotland continues to be buoyant, as evidenced by the following statistics⁹:

- Scotland accounts for 11% of the UK’s live music revenue (greater than its 8% share of the UK population);

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⁹ Music Week, Scotland Feature, 25 November 2011.
• the live ticketing sector in Scotland grew by 25% in the last five years compared with growth of 17% for the UK as a whole; and

• average annual consumer spend in Scotland on recorded music is above the UK average (£53.75 compared with £45.32).

Figure 2.4 below provides a breakdown of the performing rights distributions to Scotland, which supports the point raised about the strength of the live sector in Scotland – public performances have the largest share of the performing right distributions (36%).

In particular, (although not shown here), recent data from PRS for Music indicates very substantial growth in festivals income in Scotland – a staggering increase of 185% in a five year period.

Figure 2:4: Performing rights distributions to Scotland

Source: Music Week, 25 November 2011 (data from PRS for Music)

2.2.3 Audiences

Data from the Scottish Household Survey (SHS) provides some useful insights into attendance and participation by adults in Scotland in arts or cultural activities.

Key findings underline the popularity of music in Scotland, and show that attendance at a live music event is the second most popular form of cultural attendance after
cinema, with almost a third of adults (31%) in Scotland attending in the last 12 months. This is the largest increase in any form of cultural attendance since the last survey (up from 27% over 2007-2010).\textsuperscript{10}

2.2.4 Participation in music

The SHS data also provide an overview of participation in arts or cultural related events or activities. Key findings from the study include that in the previous 12 months\textsuperscript{11}:

- 73\% of adults living in Scotland reported that they had participated in arts or cultural activities; and
- 10\% of Scottish adults have played or written music in the last 12 months.

2.2.5 Funding and support

Public funding to support music in Scotland comes from these main sources:

- Scottish Government;
- Creative Scotland;
- local authorities; and
- the enterprise networks: Scottish Enterprise (SE) and Highlands and Islands Enterprise (HIE).

Scottish Government

The Scottish Government’s support for music is directed through two main channels (although individual projects also receive specific support):

- direct support of the national performing arts companies; and
- funds provided to Creative Scotland for distribution to the arts in Scotland.

Three of the national performing arts companies are music organisations – Scottish Opera, Royal Scottish National Orchestra and the Scottish Chamber Orchestra - and

Scottish Ballet has a strong musical component. These four organisations received c. £20m in grant support in 2010/11. In addition, the National Theatre of Scotland is increasingly involved in music.

The Scottish Government has also supported a wide range of cultural projects in partnership with local authorities, Creative Scotland and other partners, many of which have had a focus on music (e.g. Sistema Scotland, New Wing for Glasgow Concert Hall).

Creative Scotland

Creative Scotland receives a core amount of £35m from the Scottish Government, plus specific funds of £10m for the Youth Music Initiative (YMI), £1m for Innovation, £2m for the Expo Fund, and £750k for Cashback initiatives, and £24m in National Lottery Funds. While direct grant-in-aid will reduce by 2.1% each year over 2011/12 - 2013/14, Lottery Funds will increase to £35m.

The organisation has restructured its funding schemes into a series of programmes, which work across artforms and creative disciplines.

Support for music from Creative Scotland provides a wide range of funding, including to music related organisations and venues hosting music events. This includes funding provided to:

- **foundation organisations (FOs)** - organisations who have been specifically invited by Creative Scotland onto the programme and who define their contribution to a creative Scotland in terms of talent, quality production, access, audience development and participation, the economy and place; and

- **flexibly funded organisations (FXOs)** - organisations with two year funding to deliver programmes of work (as a result of a competitive bidding process)\(^\text{12}\). The organisations are now in a transition to Annual Clients or project support.

In the financial year 2009/10, Creative Scotland provided **£12 million** of support across 35 such organisations, including:

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\(^{12}\) At the time of writing, Creative Scotland had revised the Flexible Funding Programme to shift a number of clients onto annual funding and others to wider pots of Lottery money for projects.
29 organisations hosting music events/performances across 11 local authority areas; and

- six development organisations (i.e. organisations that don’t hold music events).

Of these, 17 are not music specific organisations, but include festivals with non-music content as well as multi-arts venues and theatres.

**Table 3.1** in **Appendix 2** provides a detailed breakdown of Creative Scotland funding to the various organisations. Across the different organisations funded, a total of **1,463 events** were held, attracting almost **640,000 attendances**, and generating total income of over **£50 million** in 2009/10 (including the £12 million from Creative Scotland).

Just over half of the organisations funded were located in Glasgow or Edinburgh (52%). Of these funded organisations, Edinburgh had by far the largest share of music attendances (52%).

In addition, as part of its funding for buildings, Creative Scotland awarded **£24 million** to large capital projects related to music across Scotland in 2009/10. (**Table 3.2** in **Appendix 2**). This represents over a fifth (22%) of its total capital funding.

12 projects were supported, with the bulk in Glasgow and Edinburgh (£13.5 million, 65% of total funding). Examples include: Royal Conservatoire of Scotland (RCS) (Glasgow) and Queens Hall (Edinburgh), Scottish Opera (Glasgow), and the Eden Court Theatre (Inverness).

In 2011, Creative Scotland invested a further **£10 million** in 102 music related projects. This represents some 42% of the total number of awards made through Creative Scotland’s funding programmes in that year. Feedback from Creative Scotland indicates that demand for non-artform specific funds is typically strongest from music.

**Local Authorities**

Local authorities typically play different roles in supporting culture and music across Scotland. Many own and manage venues either themselves or through arms length cultural trusts (such as in Glasgow and Fife, among others) and promote programmes of music within these venues. Most also provide grant support to local
arts organisations, many of which will be involved in music. Many authorities also support and run community based cultural programmes and events (which again frequently involve music) and, as noted above, also deliver music education in schools both through mainstream budgets and the YMI.

The data that is available on local authority expenditure on culture do not provide the necessary detail to extract spending on music, but with a total net expenditure on culture (including libraries and museums) in 2008/09 of almost £580m, the importance of local authority support for music is clear.

The local authorities are also responsible for the management of Business Gateway contracts in their areas. The Business Gateways provide business advice and support for start-up and early stage growth companies, channelling high growth prospects toward the Scottish Enterprise (SE) and Highlands & Islands Enterprise (HIE) account management systems.

**Enterprise Networks**

Both SE and HIE have engaged with the music sector in different ways over a period of years.

**Scottish Enterprise (SE)** is Scotland’s main economic development agency and it plays a leading role in the development of Scotland’s digital media and creative industries. SE’s strategic focus is on growth companies and it provides business support to businesses through its account management system. Few music companies fit the criteria for account management, but may receive support through the SE project Interactive Scotland, which addresses the needs of smaller businesses in the digital media sector. Services here are not specific to music, but rather are focussed on the wider digital industries.

SE has a long history of involvement with the music sector, and a relationship with the industry that has, at times, been fractious. In many respects, SE has long struggled to engage with music in Scotland due to the uncertain potential and non traditional growth trajectories of individual enterprises within the sector, as well as unclear expectations on the part of the industry. SE’s role is very clearly about economic growth, and priorities for investment reflect this overarching objective. The music sector has often struggled to present a clear and compelling case for its economic potential, not least due to the limitations of available data as highlighted earlier. Nevertheless, SE remains an important partner for the industry, and its
involvement in the SCIP is crucial. Through this mechanism, SE is developing closer relationships with other public sector organisations to help develop the music sector.

**Scottish Development International (SDI)** is joint venture between the Scottish Government and Scottish Enterprise, and is a government funded organisation that can help businesses exploit Scotland's key strengths in knowledge-based industries, high-level skills, technology and innovation. With offices in the UK, mainland Europe, North America and Asia, SDI aims to:

- develop partnership investments between Scottish and other companies to open new channels to markets, technologies and products;
- increase trade growth by encouraging the expansion of Scotland's portfolio for first class exported goods and services to new markets;
- help to strike licensing deals between Scottish and overseas companies and universities; and
- attract direct investment, concentrating on research, design and development projects with high knowledge content.

SDI has previously engaged with the music industry in Scotland by supporting a Scottish stand at the international trade fair MIDEM in Cannes, and various music businesses have been supported on a one-to-one basis. Recent discussions between Creative Scotland and SDI have identified opportunities for future collaboration around music.

**Highlands & Islands Enterprise (HIE)** has a Creative Industries team responsible for co-ordinating the Network’s activities in this area. The approach of HIE is to work where possible through industry groupings and representative organisations to encourage the creative industries to collaborate and to take responsibility for their own growth and development.

HIE has particular interest in music. Through HI-Arts, HIE helped to establish Highlands and Islands Labels (HAIL), the trade association for independent record labels in the region, and was instrumental in the development of Go North. HIE has also supported numerous music businesses and bands across the region, and administered the Scottish Government’s New Futures Fund with SE in 2007 making

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13 Creative industries, electronics, software/e-business, forestry, food & drink, aerospace, financial services, contact centres and biotechnology.
investments into music businesses. HIE’s proactive approach to music industry development has frequently received particular praise, and it is widely supported by the sector.

3. Making and Performing Music

3.1 Introduction

Musicians, promoters and audiences are at the heart of this review. The performance, presentation and promotion of live music throughout Scotland is extraordinarily widespread - and as wide ranging and diverse as the musical styles, performing groups and enthusiastic promoters that make up Scotland’s musical life.

To examine this spectrum of activity, we interviewed a cross section of the musicians, creators, performing groups and organisations representing a core of professional live music provision, as well as promoters, festivals, and venues. We also spoke to several organisations representing parts of the amateur music sector.

In this section we explore the ecology of music making and performance by considering:

- professional music making across various musical genres;
- the amateur/participative music sector;
- promoters and venues;
- opportunities for touring; and
- audiences.

3.1.2 Genre

It should be noted that although we refer to musical genres, many musicians, creators, audiences and others engaged with music move between genres; and many musical activities involve collaboration between genres and/or artforms, or the invention of new genres. Public policy needs to be flexible enough to respond to the range of music being produced, while supporting and valuing a consistent infrastructure which underpins and enables musical excellence and experiment.
So whilst there was a temptation to set out findings in separate sections about each main genre of music, it was apparent that if we adopted that simplistic approach it might reinforce the false notion of their separateness - and also lead to repetition of the issues that they share in common.

Therefore the following sections touch upon the real differences and issues for specific genres if or where they arise - but in the main they focus on issues shared by more than one area of music.

3.2 Professional music making

3.2.1 Music under the radar

The 2010 survey of Scottish-based MU members confirmed that the great majority earn much of their living from small-scale public events - such as residencies and gigs in pubs, clubs, hotels or restaurants, providing background music to the venues’ social business.

Equally important for working musicians are the innumerable private functions where music is required for general entertainment or dancing. Weddings, organisations’ annual ‘do’s’, parties, conference entertainments, dinners and dances, ceilidhs for groups and associations, trade promotions - even funerals and memorial events - all fall into this category.

Although we have not quantified these events, which are so often absent from analyses of live music, it is important that they are registered as a very significant part of the music ecology. They not only offer access to live performance for the widest possible cross section of the public but also make an important, sometimes hidden contribution to the music economy.

3.2.2 Performers and performing groups

Orchestras

Classical music provision in Scotland is underpinned by work of the two full-time symphony orchestras - the Royal Scottish National Orchestra (RSNO) and the BBC Scottish Symphony Orchestra (BBCSSO) - and the Scottish Chamber Orchestra.

Craig Macleod 2010: Musicians’ Union Report - M Litt Music Industries
(SCO). Scottish Opera also employs a part-time orchestra which seeks opportunities for concert work. The RSNO, SCO and Scottish Opera are funded directly by the Scottish Government as three of Scotland’s five ‘national performing arts organisations’, while the BBC SSO is funded by the BBC via the licence fee.

Some of the musicians contracted to these orchestras also play in the smaller established classical music ensembles and/or their own groups, and many do instrumental (or vocal) teaching, whether at the RCS, through music services or privately. For a country of its size, Scotland benefits from a strong body of resident professional classical musicians, most based in the central belt, and the professional music companies are a significant and important resource.

Like the musicians, the managers of these classical music organisations and ensembles are respected professionals, well networked with each other and with similar organisations elsewhere in the UK and abroad. In general, the quality of performance by the national companies is seen as excellent by external assessors, and they attract exciting international conductors and soloists.

The separate funding of the national companies is unique in the UK, and merits some comment. We met some debate about whether other music organisations might justifiably claim to meet the published criteria, and indeed some views that the national companies, as key arts organisations in Scotland, should be within the remit of the national cultural agency (Creative Scotland). However, we have focused our analysis on the current group and the prevailing governance arrangements.

Whatever they think of the principle, the national companies have been removed from competition with much smaller organisations, and feel they benefit from the government’s approach which includes: the ability to plan long-term; political and civil service support; PR; international funding; and external assessment.

On this last point, the government pays experts to come from across the UK to assess the artistic work of the nationals on a regular basis. However, in common with all other music groups and organisations funded by Creative Scotland, the work of the orchestras’ nearest cousins, chamber music ensembles, whether FOs, FXOs or project funded, is not independently assessed. The contrast between the level of

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15 The criteria include carrying out large-scale productions, operating on an international and national scale, achieving highest professional standards, and providing leadership in Scotland.
attention paid to assessing the nationals and all other music-making, whatever the
genre or scale, is sufficiently striking to require comment.

Standard classical repertoire is much in demand by members of the crowded
orchestral scene, especially in Glasgow and Edinburgh. The orchestras have to
work hard to avoid duplicating each other’s choices and provide distinctive
programmes for their audiences.

When the orchestras divide into smaller groups - especially to fulfil their role of
working far and wide in Scotland - they sometimes programme large-scale chamber
music which overlaps with other ensembles - an issue also raising the contrast
between the position of the nationals and the rest of the classical music scene.

**Ensembles**

The Scottish Ensemble is Creative Scotland’s only classical (or any other kind of)
music ensemble that is an FO, and thus has three years funding for planning ahead,
enabling it to employ a staff team and join planning meetings with the national
companies and BBCSSO.

Other ensembles such as the Hebrides Ensemble and Red Note, are in the current
transition to annual client or project funding, and therefore have less financial
certainty, at least at the time of writing.

The Scottish National Jazz Orchestra (SNJO), a Creative Scotland FXO until
recently, and the project-funded Glasgow Improvisers Orchestra (GIO) are the only
examples in Scotland of consistently funded set-piece ensemble structures outside
of chamber music. The SNJO performs a great deal of repertoire music as well as
new commissions and, like the GIO, often invites guest soloists. Both share most of
the concerns of the chamber ensembles about stable resources and long-term
planning.

Regular groups in other areas of music - especially larger and therefore often
economically more unwieldy ones, such as, for example, the Treacherous Orchestra
- have access to project funding streams in the same way as any performers and
have benefitted from recent funding from Creative Scotland. However, it is difficult to
see how more than one or two of the dozens of interesting groups of all kinds of
music could become regularly funded in the manner of the ensembles above. There
are simply not the funds or the mechanisms to cope. What is important is that there should continue to be open and simple access to funding for specific projects.

The established classical companies and ensembles did not report problems recruiting and retaining musicians. Like their equivalents elsewhere in the UK the orchestras can select from an international pool of musicians competing for jobs. They do not have a ‘Scottish first’ policy, but can attract some of the most outstanding Scottish musicians wishing to play in their home country.

No other groups put a residency qualification on their members either, of course. But it would be more accurate to say that, for instance, the SNJO, the Delgados or a traditional music group like Capercaillie or Blazin’ Fiddles generally comprise Scottish-based musicians rather than a trawl of UK or international talent.

For everyone - traditional groups, rock bands, jazz and chamber groups and soloists outwith the small number of set-piece ensembles, exposure is mainly a case of competing for bookings from venues and promoters.

A regular relationship with a promoter can offer a group or individual artist a rare opportunity to develop repertoire and audiences, examples being the Edinburgh Quartet with Edinburgh Napier University, and Dunedin Consort with Perth Concert Hall. The residency model, although less prevalent for other genres, can also be offered by festivals and even local authorities. Creative Scotland and other lobbying influences could encourage these kinds of relationships in order to offer more opportunity for longer-term development to musicians across the genre spectrum.

**Choirs**

There is no professional choir in Scotland (other than Scottish Opera’s freelance chorus), but the excellent voluntary RSNO chorus and the SCO chorus sing regularly with their respective orchestras, and award-winning National Youth Choir of Scotland (NYCOS) has performed with Scottish and other UK professional orchestras. Research did not suggest the lack of a professional choir to be an issue.

**Music Theatre**

One gap - the lack of a dedicated professional small-scale chamber opera or music theatre company - is being addressed by Scottish Opera through a co-commissioning relationship with Music Theatre Wales and its own smaller-scale
commissions and productions. The new model for Scottish Opera, and what it can offer throughout Scotland, is still very much under development. Other initiatives include the Hebrides Ensembles commitment to music theatre, Red Note’s collaborations with theatre composers and companies and Noise Opera. In addition, the RCS has delivered a popular and successful course in music theatre for many years.

The young generation

We should mention the National Youth Orchestra of Scotland (NYOS) and NYCOS here. Discussed further in the section on Youth Music, they have been very much part of classical music provision and life in professional concert settings. Increasingly their comparators in jazz, brass bands and piping are making a similar impact in the professional sphere of their genre. The TSYJO youth jazz orchestra led by Tommy Smith, for instance, is regarded by him and many others as a feeder orchestra for the full SNJO.

Repertoire

Between them, the established orchestras and ensembles offer repertoire from the middle-ages to contemporary composition. This is complemented by the concerts given by amateur groups and orchestras and by events out of higher education establishments, also wide ranging and often experimental. Enterprise Music Scotland (EMS) encourages new music through its annual commission and dialogue with voluntary promoters.

Although there is no dedicated contemporary music orchestra\(^\text{16}\), Red Note Ensemble performs the established classics of contemporary music, commissions new music, develops the work of new and emerging composers. The Hebrides Ensemble also has a strong list of commissions to its name. The SNJO, Scottish Ensemble and the Dunedin Consort all include newly commissioned works in their programming.

Opportunities for commissioning new work and hosting new projects have been pursued with increasing confidence by festivals such as Celtic Connections and imaginative promoters such as Mull’s An Tobar. There is good evidence that the

\(^{16}\) The London Sinfonietta is the only one in the UK.
commissioners’ confidence in recent years has spurred on composers in traditional music and jazz to produce a good deal of new and exploratory projects.

**Songwriting** has long been a strong suit amongst Scottish musicians, running through and blurring the boundaries from traditional music into rock and pop. Indeed, one of the UK’s most successful current songwriters, Calvin Harris, is based in Glasgow. The appetite for favourite and new singer-songwriters is also as strong as ever amongst audiences, and events such as the annual Burnsong festival have added emphasis to the strength and importance of their craft.

Despite (or perhaps because of) the lack of a commercial classical music publisher in Scotland, there is a strong collection of well-known composers living in Scotland, including those grouped around the RCS and its emerging graduates. Their music is commissioned by many Scottish groups and companies (including theatre and dance), and is often heard on national radio. Nurturing and promotional work by the Scottish Music Centre (SMC) provides a bedrock for Scottish-based composers (such as Sally Beamish) and with an open-minded attitude to new music among some performing organisations (and some audiences) new Scottish repertoire is included in orchestral concert series and education/outreach programmes.

Festivals such as East Neuk and Sound provide annual concentrations of twentieth century and new classical music. However, there is not a year-round circuit of promoters/venues able to experiment and develop audiences for such new music across Scotland in a sustained way. The same is acutely true in jazz - regular exposure is limited for new projects or the unfamiliar, whether from Scotland or further afield and this issue is one that jazz interests are anxious to address. In rock and indie music, the issue for most new or emerging bands will be to get recognition in a crowded and ever-changing market place - the exposure they can gain via investment and support from management and record labels is crucial.

**Growth and sustainability**

In our survey, individuals and organisations involved in music-making showed a concern that strategies for a healthy music scene should strengthen the infrastructures in which they operate. Access to funding was obviously important in achieving this and in supporting artists to make the most of their creative opportunities.
For ensembles, the differences between the national companies and FO, FXO and project funded ensembles in resources for their operational infrastructure are a source of concern. Although the national organisations are experiencing severe cuts, these have been planned for and have not jeopardised their operations.

The funding uncertainties facing many ensembles affect their ability to plan ahead, establish managerial staffing, maximise audience reach and ticket income, work with promoting partners, fundraise, make international contacts, and progress special projects and commissions. Creative Scotland has been supporting ensembles with national and international potential, and some interviewees suggested that there may be more to do in this respect. The availability of resources is, however, an obvious consideration.

The issues facing jazz in Scotland are not uncommon elsewhere. The scene, in terms of talent and quality, has grown considerably in the past twenty years. There is a great deal of talent amongst the musicians, and more coming through with the growth in jazz education. The key issue here, about which jazz activists are particularly exercised, is that there is a dearth of regular gigs and promoters who can develop opportunities and bring in audiences.

The growth and vitality of traditional music has been the most celebrated success story in Scottish music in recent years. Wave after wave of talented musicians have kept coming through and the infrastructure of festivals and promoters has expanded to accommodate them and their growing audiences. For the traditional scene the issue is one of sustaining and adding to that level of growth.

The traditional music sector also has a serious concern about the recognition it receives and its status as uniquely able to represent a Scottish identity, however multi-faceted that may be in music. Organisations such as the Traditional Music Forum and the campaigning Hands Up For Trad are tireless in pursuing those issues and working to raise the profile of Scottish traditions.

In rock and pop, Scotland has a long tradition of innovation and success and continues to produce artists with major international profile, even if the majority go on to sign with labels and management outwith Scotland. Specific mention should be made here of the vibrant dance music scene. Scottish DJs and producers, and the labels and promoters associated with them, continue to work internationally as well as promoting highly successful events on home ground. Soma Records is the biggest and longest standing dance label in Scotland, formed by Scotland’s most
prolific club DJs, Slam, with newer companies and collectives such as Numbers, artists like Jackmaster and Auntie Flo, and promoters such as Sensu and Huntley and Palmers finding increasing success in the club scene here and abroad. Indeed, if DJs can be considered to be part of the live music industry (and there are arguments for their inclusion) then the dance/ club scene in Scotland must be an important part of the music economy.

As described in the section on Networks and Agencies, most of the various musical genres - and the music industry that focusses attention on rock, pop and more commercial forms of music - have infrastructural support from dedicated development organisations. This is a complex landscape with potential for overlap and duplication, but while we address these issues in more depth later, it is important that the guiding principle is that all areas of music should have equity of opportunity and equity of access to the necessary support for their activity.

3.3 Amateur music making

In addition to the professional music world, the next and very extensive category of music making is that by amateur musicians. They comprise a very wide range of people and musical styles - including, for instance, those who play in jazz or traditional music groups and sessions, covers bands, blues or rock groups and any other musical style that can be imagined.

While those kinds of groups and their number of performances are unquantifiable, there is an indication of how extensive they may be (even if somewhat out of date) in a 2008 study of participation in the arts, Taking Part in Scotland 2008\(^\text{17}\), which reported key findings including that:

- 71% of adults living in Scotland had participated in arts or cultural activities during the previous 12 months; and
- 15% of Scottish adults had undertaken any performance (i.e. drama/amateur singing/choir/Scottish traditional dance/playing a musical instrument/ amateur opera or light opera/amateur dance or ballet) in the previous 12 months.

\(^{17}\text{Scottish Government, People and Culture in Scotland 2008,}\)
Playing a musical instrument was fifth highest in terms of overall levels of participation – 8% of Scottish adults (roughly equivalent to 340,000 people) had played a musical instrument in the previous 12 months. These included a larger proportion of men (10% participated) and of those aged 16 to 24 (15%).

Data from the previous SHS report provides some further insights into participation in cultural activities, including:

- 28% of adults reported that they were encouraged to play musical instruments, act, dance or sing when they were growing up; and
- 11% of adults played a musical instrument for their own pleasure in the previous 12 months;
- 5% of adults had sung to an audience in the previous 12 months;
- 4% of adults had played a musical instrument to an audience in the previous 12 months; and
- 4% used a computer to create music in the previous 12 months.

More recent SHS data also show that almost a quarter (24%) of young people in Scotland (between the ages of 8 and 21) have been involved in music or drama activity in the last 12 months. This is exceeded only by participation in sporting activity (54%). Further statistical evidence is available on those performing groups that, by their nature, have a more formal or permanent structure and whose multiple annual public performances are either hosted by other promoters or presented by themselves.

- Making Music Scotland (MMS) registers 137 vocal groups as members - added to which are 68 instrumental groups (mainly chamber or classical music);
- the Royal Scottish Pipe Band Association (RSPBA) reports around 300 active pipe bands in Scotland;
- Scotland’s National Association of Accordion and Fiddle Clubs, has 43 clubs as members; and

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the Scottish Brass Band Association (SBBA) identifies 133 brass bands based in Scotland, 63 of which are youth brass groups.

All of these kinds of events and performing groups (to which we can also add the huge array of youth groups performing throughout Scotland) offer not only participation in music for the performers but an array of opportunities across the country for audiences to hear live music of every kind. Many groups commission new work, and some form exchanges and alliances with organisations in other countries or elsewhere in the UK.

They also form another part of the economy of music in that many groups employ professional musicians as soloists or support for the amateurs in performance, or as leaders and conductors.

Because of the scale of amateur music-making and its value to professional musicians, composers and audiences, MMS argues that its members should be able to apply for Creative Scotland project funding and commissioning funds in certain circumstances. MMS itself has been in receipt of flexible funding, crucial for enabling its work in strengthening the promotional and performing quality of the sector.

3.4 Social communities

The music sector in general acknowledges the importance of access to music-making (as participants and as audiences) for particular groups within Scottish society. Many of the professional and amateur music organisations profiled throughout this report have outreach or community programmes - but there are also organisations, such as the examples mentioned below, which concentrate on specific issues and groups of people.

Access to music making for children and adults living with a disability is the prime concern of Drake Music Scotland and of Limelight (formerly Sound of Progress). Both have extended programmes, funded by a range of trust and public agencies and both work with other educational, social and cultural partner organisations. Limelight includes a particular focus on working with those who take their music-making to a professional level.

Drake Music Scotland is affiliated to a sister UK organisation, as is Nordoff-Robbins Scotland. Nordoff-Robbins’ mission is to work in music therapy - in settings including hospitals, schools and clinics - with vulnerable children and adults and its
work extends to training music therapists at degree level. The Tartan Clef fundraising and awards scheme has given Nordoff-Robbins a high profile within the music industry.

Live Music Now Scotland is also affiliated to Live Music Now throughout the UK. Its role is to take young professional musicians to play to audiences in closed communities - for example hospitals, day centres, special schools, hospices and prisons. The annual programme currently provides approximately 400 such events, using around 80 young musicians from various genres including jazz, classical and traditional music.

3.5 Promoting live music

3.5.1 Self-promotion

The promotion of full-scale orchestral music across Scotland is predominantly managed by three permanent orchestras - the SCO, RSNO and the BBCSSO – which take the financial risk of the promotions themselves, as well as a major share of the marketing and concert production. Over 50% of their core work was in Edinburgh and Glasgow - but both orchestras also regularly visited Aberdeen, Dundee and Inverness, occasionally Perth, and the smaller-scale SCO made a number of visits to smaller locations such as Ayr, St Andrews and Dumfries as well as venues in the Highlands and Islands and Borders.

Statistics are not published for the BBCSSO but their annual concert schedule is based in the City Halls, Glasgow and they regularly play Edinburgh, Aberdeen and occasionally other locations such as Inverness and Perth.

Other incidences of this kind of self-promotion include the small number of classical music and jazz ensembles that receive various kinds of funding (from Creative Scotland or trust fund sources) in part to promote their own concerts or to tour.

The amateur choirs, orchestras, brass and pipe bands and the full range of other set-piece music organisations outlined in the section above are generally self-promoting. They hire the venues, publicise their events and very often manage their own ticket sales, although they may have opportunities to have concerts hosted or promoted by other local venues and promoting organisations.
There are also occasions when individual bands and groups, playing any kind of music, decide to promote and take the financial risks and benefits of their own gigs. Motivated by the desire to play or to control their own marketing and finances, bands may support these promotions with their own funds or, occasionally, by raising commercial sponsorship or non-commercial funding. In the overall scope of music promotion in Scotland, however, this category of self-promotions play a minor part.

### 3.5.2 Pay to Play

In the sphere of rock/pop/indie music, there is a widely reported increase in the incidence of ‘pay to play’ promotions. Some clubs and promoting venues which present regular programmes of gigs do not offer bands a fee to play but instead demand an upfront payment from the band - ostensibly to cover PA, publicity and other costs. Some will then allow the band a percentage share of bar profits or (if there is a door charge) of ticket sales - factors which are only (partly) in the band’s control if they can attract a sufficiently large following to provide the promoter with a good-sized crowd at the venue. This is an example of the transference of risk onto artists referred to in the chapter on the recording industry.

Pay to play is generally seen as an exploitation of musicians’ enthusiasm to play and to reach their audience, though unlikely to be the subject of legislative prohibition. It is, in many respects at one end of a spectrum that includes practices such as bands being require to sell tickets and CDs themselves, although arguably a more extreme manifestation of the transference of risk.

Mainly found in purely commercial premises, it could be guarded against in any venues that receive public support by explicit conditions of funding. Creative Scotland does attempt to do this where possible by insisting upon industry standard agreements and MU fees for musicians, but there may be scope to extend this practice to other public bodies.

### 3.5.3 Promoting organisations

For most other live music events, the promoter is a separate entity from the performers. The SMC database lists 355 promoters of all kinds in Scotland. Between them they cover almost all styles of music and scales of event from headlining stadium rock gigs to 30-seater folk sessions.
Whatever the scale and size of their events, the promoters fall into some basic, though overlapping categories, offering a complex pattern of provision across the country.

**Music venues**

Larger scale promoters in this category range from the Royal Concert Hall and Old Fruitmarket in Glasgow (ex-council owned and now under the trust umbrella of Glasgow Life) or Glasgow's Barrowlands (commercially run) to Edinburgh’s Usher Hall (council owned) to Inverness’ Ironworks (commercially run) and Perth’s Concert Hall and the Aberdeen Music Hall (also both in newly-established trusts). These larger-scale (over 1,000 capacity) venues present their own events as well as hiring the venue to other promoters.

The resulting programmes of events - mainstream within their various musical genres - provide audiences in the larger cities with a **good range of the more popular artists**. The trust or council-run venues are supported by some form of public subsidy and will generally have a programming budget to subsidise their own promotions.

Smaller and mid-scale music-specialist promoting venues generally follow the same pattern of own-promotions added to events promoted by external hirers. The great majority - of various sizes under 1,000 capacity - are commercially run clubs and gig venues, such as the Liquid Rooms in Edinburgh, Hootenanny’s in Inverness, The Garage, the Cathouse or King Tut's Wah Wah Hut, all in Glasgow. Like the larger venues above, they are mainly situated in major cities and provide a range of non-classical music, predominantly rock and indie bands.

The main exception in this middle and smaller scale category of promoting venues is the **Queens Hall** in Edinburgh. Promoting a wide range of styles of music ranging from smaller-scale chamber music to jazz, traditional and 'world' music and singer-songwriters, and hosting a similarly wide programme promoted by hirers, and in particular the SCO, the hall is an independent charity and can only support its own programming by way of project grants and use of its own slender resources. It is, however, a key promoter in the capital and provides a range and scale of programming that no other Edinburgh organisation currently offers.

It is **increasingly difficult** for this category of venue to experiment or take risks in programming due to falling ticket sales in the recession and, for the funded venues,
cutbacks in funding from local authorities. The fixed costs and maintenance of venues inevitably soaks up an increasing proportion of their available funds and necessitates increases in hire charges to external promoters.

**Multi-arts promoting organisations**

Across Scotland - and serving many of the smaller towns, rural and island areas - a broad range of music (except for larger orchestras) is presented by a key group of multi-arts promoters. Usually based in their own mid-scale (i.e. 100 - 500 capacity) venues, they include organisations such as An Lanntair (Lewis), Comar and An Tobar (both Mull), Aros (Skye), Peebles’ Eastgate Centre, Woodend Barn in Banchory, the Carnegie and Rothes Halls in Fife and city venues such as Aberdeen’s Lemon Tree, Stirling’s Tolbooth and Glasgow’s CCA.

Characteristically set up as multi-purpose venues and arts centres, most are run with local authority or Creative Scotland funding of some kind. There are, however, a small number of independents who operate without regular or direct funding – such as Ullapool’s Ceilidh Place and Glasgow’s Oran Mor. There are also occasional funded organisations without their own dedicated premises - although the most obvious, the Shetland Arts Development Agency, is currently building its own in the Mareel Centre.

These promoters are an essential part of live music provision, at a mid-scale of promotion that covers the country and serves local audiences far more extensively than the large-scale gigs and concerts that only exist in the cities. They were all established in order to support arts and live music provision that does not, in general, find itself commercially viable – on the principle that a fair spectrum of musical experiences should be available to the population of any area. These promoters also provide an important nation-wide platform for Scottish artists and, in most cases, are also the informal sector links to participation in community and educational music-making.

Our survey and consultation interviews elicited clear indications that this group of promoters were finding conditions increasingly challenging in relation to the coverage they wished to achieve. Local authority funding cuts, which affect most of them and limitations on securing guaranteed support from Creative Scotland (other than the FOs and FXOs which did receive two or three year funding) and challenges in areas like fundraising capacity and the funding sources available all put
constraints on the range and risks that they could afford to take in programming. Many have tried to programme more popular events to generate more income with which to cross-subsidise more adventurous programming, but these efforts have typically met with limited success. Limitations on marketing capacity and on available supported touring and creative projects, rising fixed costs and the audiences’ own financial constraints all contributed to their inability to invest in adventurous programming or in long-term audience growth via a consistent range of quality promotion.

Geographical coverage by these promoters is, with the occasional blind spot, good. The gaps or limitations in their programming, aside from the general cautions referred to above, tend to be in contemporary chamber music, jazz, experimental and ‘world’ music – including all of these on a European or international level. The knock-on, circular effect of these limitations is that the artistic programmers do not have the opportunity to develop knowledge or skills in these areas.

Volunteer interest groups

Another collective backbone in the provision of live music is the host of unpaid voluntary promoting groups who promote their chosen music in various venues with which they have a hire or hosting arrangement. As distinct from the volunteer groups which promote amateur music-making, these groups generally support professional performers (although there is some cross over) and predominantly in the fields of chamber music, jazz, Scottish and British traditional/folk music.

Enterprise Music Scotland (EMS) supports chamber music promoters with small grants drawn from funds devolved from Creative Scotland. Its website shows a map of 92 chamber music promoters in Scotland - predominantly voluntary chamber music societies and clubs. EMS’ own direct membership is over 70 promoters. MMS, which supports voluntary music in all its guises, lists 32 of its members as volunteer promoters.

In traditional music, the Traditional Music and Song Association (TMSA) has 11 volunteer branch organisations which all promote events on some scale, often mixing professional and amateur performers as must be the case in this area of music more than any other.

Added to the TMSA branch organisations are the self-organised folk clubs dotted around the country - harder to quantify although the TMSA lists 13 on their events.
calendar, Living Tradition magazine’s website names 36 and the website www.scottish-folk-music.com has 47.

Jazz is the other interest area in which volunteers have played (and continue to play) a significant role alongside professional promoters - although volunteers in jazz are far fewer in number (and the number is believed to still be diminishing) than in chamber or folk music.

Volunteer promoters are an essential part of the spectrum of provision. Their geographical coverage is remarkably wide and they often serve less populated areas. Their promotions need and deserve regular support. The increasing demands upon them suggest a general need for further professional training or experience in the skills and knowledge required for effective promotion – and the support organisations such as EMS and Voluntary Arts Network (VAN) are able to provide such help.

Independent promoters

Scotland has a small cadre of independent promoters who hire (or make profit-share arrangements with) venues to present their own shows. These are commercial operators – companies such Regular Music, CPL, Beyond and DF Concerts (although DF is now owned by Live Nation, the largest live music company in the world and, as such, cannot be considered to be ‘independent’). They also include Jazz Scotland (formerly Assembly Direct), a partly-subsidised jazz promoter, whose main work is currently in promoting a range of local jazz festivals.

The scale of work of these independents varies from stadium-size gigs to small scale. They focus on commercially viable artists - rock, indie, pop and singer-songwriters. Some are involved in producing festivals (DF runs T In The Park, for example, and Beyond has been involved with events such as Rockness, Loopallu and Belladrum) and in some cases have ownership or connections with independent venues (again, DF runs King Tut's in Glasgow and the director of Beyond is also a director of the Ironworks in Inverness).

Audiences in (or able to reach) Glasgow and Edinburgh are well-served by independent commercial promoters. The coverage is more limited in the other main cities, since shows outside the two big cities are much less likely to generate sufficient turnover, although when possible the independents will promote artists in Dundee, Stirling, Inverness, Perth or Aberdeen. Of late, Inverness has seen
improved coverage due to the collaborative work of Beyond, the Ironworks and their associated festivals.

While the commercial live music industry has been growing strongly for some time now, there are signs that this growth is starting to slow or even contract. There is also a long standing, but growing trend toward heritage acts as the big earners. Nostalgia is big business in rock and pop.

In Scotland, there is a considerable gulf between the resources and capacity of the big players like DF and Regular and the smaller promoters, and market forces are such that the bigger promoters enjoy far greater market reach. Nevertheless, they are a crucially important part of the live music mix and bring a wide range of music to the people of Scotland. Companies like DF and CPL also have a very strong role in championing newer talent through their promotions in smaller venues such as King Tuts or the Cathouse.

However, it should be noted that there may also be potential for displacement in areas where subsidised provision overlaps with commercial opportunities, and public intervention must be careful to work with and not against the market.

3.6 Festivals

The List’s Guide to Scotland’s Festivals 2012 identifies an astonishing 370 festivals, of which 163 appear to be either entirely music or involve music as a significant part of their programme. The SMC online directory adds a few to that total, making it 177. Despite the slight numerical discrepancy, both sources include music festivals of all kinds, of all genres, commercial and subsidised, large and small, indoor or outdoor and in (almost) every part of Scotland.

Festivals have been a huge growth area in the past few years. The expansion of the festival scene developed exponentially in the 1990s with the development of such festivals as T in The Park, Glasgow International Jazz Festival (GIJF) and Celtic Connections, whose success has led to an even wider range created in the past ten years, of events such as RockNess, Belladrum Tartan Heart, several smaller jazz festivals such as Lockerbie, the Gaelic celebrations of Blas, the Sound new music festival in North East Scotland (operating from Banchory) and St Andrews’ Voices.

This story of growth in Scotland’s festivals has been the same as in the whole of the UK and Europe. Without attempting too close an analysis, it is clear that festivals
offer a combination of attractive short periods (social events, quasi-holidays) for enthusiastic audiences, with immersion in their favourite music at a pro-rata cost that is generally far less than the cost of a string of one-off concerts.

The cost for producers and promoters of these multiple-performance events is also generally less - and the audience attraction of many of the artists is greater - than single concerts. And in localities where there are not many opportunities to hear specific kinds of music, the concentrated ‘dose’ of a particular favourite music is a welcome annual highlight.

As tickets sales and attendances have increased and thus encouraged more organisations into festival promotion, the creation of new festivals has also been motivated by increased awareness of their impact on tourism, in-coming economic benefits and raising the general profile and regeneration of a locality. Economic impact studies (such as those of Edinburgh’s Festivals and T in The Park) have demonstrated to a wide range of public agencies the extensive economic and cultural value of festivals. Indeed, this evidence base provides robust proof, if any were needed, that cultural tourism is alive and well in Scotland’s music sector.

The festival model can make it possible to extend and deepen the artistic offer for audiences, both in terms of that which is available in a locality and, especially for subsidised festivals, what is available in a particular genre - the programmes of examples such as Sound, East Neuk, Celtic Connections, St Magnus or Blas make the point unequivocally.

But there is a tension between the various artistic and economic benefits which prompt public agencies to invest in festivals as highlight events and the fundamental work of building provision and serving audiences throughout the year. Both are necessary. If, in a period of public funding restrictions, the funding imperative was to focus on achieving short-term, high-impact results, then the danger is that support for the steady, year-round promotion that helps to attract audiences and sustain artists could be further restricted and thus the groundwork that builds interest in festivals would deteriorate.

It is also worth stating the obvious here: that the impacts derived by festivals are not uniform. Size of event and big name artists may produce tangible economic and PR impacts. Ingenuity, quality and creative artistic programming may produce impacts on the cultural scene that are less immediately obvious but which influence audiences and artists in the longer term.
Our consultations, even amongst festival organisers, revealed concerns that, with growing limitations on support funding for regular promoters, festivals may sometimes discourage or displace promotion that might otherwise happen at other times of the year.

Commercially-driven festivals - and these are generally those majoring on rock, pop and indie music, often with the support of commercial sponsorship and public funding - are market-led and the market will find its own levels of supply and demand. The recession has affected the viability of some of the less well-established or under-resourced festivals and the general view is that the market is now saturated, given the competition within Scotland and the even fiercer competition from the rest of the UK. The danger here is that the market might be distorted by further funding for new or failing events from public agencies seeking the tangible impacts as described above.

Local authorities, given their role in community provision, and Creative Scotland, with its interest in artistic and audience development, are the most appropriate agencies to help ensure that an emphasis on special events (e.g. festivals) and on the economic and ‘place profile’ benefits are balanced with long-term, regular provision in live music.

As with the promoters defined above, there are many festivals that are run by volunteers. Their reports are that the demands placed upon them by legislation, regulation and the administration of public and private funds have steadily increased and that, despite their voluntary status, festival personnel are now required to have professionalised skills to run their event safely and efficiently.

Volunteers are present in significant numbers, too, in otherwise professionally managed festivals, undertaking a wide variety of roles such as stewarding, artists’ care and marketing assistance. The Hebridean Celtic Festival and St Magnus Festival in Orkney are two notable examples. This is a strength, but also an issue as volunteers are increasingly expected to take on professional roles, sometimes without adequate training (e.g. on health and safety or security issues).

Most of the larger festivals do have professional staffing and a professional fundraising capacity, and the majority of non-commercial cultural festivals depend on a significant degree of sponsorship and trust funding to complement public sector support. Our consultations, however, demonstrated that staffing resources are increasingly stretched as the demands on them grow. Staffing costs, however
limited, are unlikely to be supportable via commercial sponsorship or trust funding (increasingly difficult to obtain and, when it is secured, demanding recognisable projects or strands of activity and marketing exposure). Core, non-project related funding is therefore crucial to sustaining staff resources within these organisations.

Restrictions on available funds, difficulties maintaining ticket sales in a recession and the steady growth in core and production costs also have a distinct effect on the breadth and depth of artistic programming. Festivals responding to our consultation were clear that their aspirations - to present new or adventurous or experimental projects or artists not yet well-known in Scotland, and especially from other countries - were increasingly constrained.

In common with other promotion, festivals in Scotland also include amateur and competitive events of differing scales and scope such as the Royal National Mod and the World Piping Championships.

### 3.6.1 Touring

**Self-organised touring**

The Scottish Government, directly funding three organisations as part of the national companies’ portfolio, is primarily concerned with the overall coverage that those companies collectively provide. Each national/BBC company is taking its own approach to being nationally accessible, in particular through touring at different scales (SCO, RSNO, SO), working through new media (BBCSSO), and education/outreach activity (all). However, orchestral concerts and opera performances remain largely focussed on two cities.

Alongside this work the individual ensembles create concert series at key centres. The Scottish Ensemble tours a number of programmes each season, majoring on cities but also taking in smaller locations where possible. Some other chamber groups and also the SNJO have received funding under the FXO system for annual programmes that include an element of touring. Changes in FXO status mean that these groups can now apply for support for a two year programme of activity, or project funding to support any touring activity.

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20 A comment was removed from this section following post-publication feedback from the Association of British Orchestras (ABO) – see Appendix A: Amendments, No. 1
Aware of increasing costs of touring and pressure on audience wallets, several organisations are currently re-thinking the way they relate to their audiences. The Scottish Ensemble is exploring a week-long residency model in Aberdeen, the SCO is looking afresh at the purpose and content of its education programme, and the RSNO is aiming to increase national concert-giving and to reach new audiences and communities. There is discussion about what level and geographical spread of orchestral provision is appropriate (and feasible) for the country.

Given the level of public funding in these organisations, regular planning meetings and goodwill between managers will remain essential, and it is important that the Government and its agencies maintain robust oversight of the distribution of activity cross Scotland, highlighting areas of over- and under-provision, this could open opportunities to target priority areas, and for Creative Scotland to engage venue managers and local authorities in creative discussion of different models (touring, residencies, hub with outreach, etc).

Individual groups with neither FO or FXO status - obviously the vast majority - can only operate their own tours of Scotland if they can self-finance through fees paid or tickets sold and other ancillary income, or if they can subsidise an individual tour as a project by raising project funds from Creative Scotland or trust funds. Project-funded touring is notoriously difficult to organise, given the different lead times for grant offers and venue bookings, and there is work to do to reconcile these timescales.

**Music touring frameworks**

There are some incidences of provision and/or frameworks for music touring within Scotland. Based around promoters, they have grown circumstantially and are specific to certain interests rather than part of a strategic overview of music provision.

Independent promoters such as Regular and Beyond will organise tours of their chosen artists either as straightforward commercial ventures or, sometimes, as an investment in building the profile and attraction of an artist for future benefit. Artists will be usually from the rock/indie/singer-songwriter spectrum or may also include higher profile traditional music artists. The artists may be Scottish or may be from the UK and elsewhere.

Other tour activity includes:
the annual EMS touring conference, at which attendees are encouraged to create tours among themselves for chamber music artists and groups that they choose from a touring directory provided by EMS;

PAN - the Promoters Arts Network in the Highlands and Islands for all performing arts - assists its members - a large number of generally small scale and volunteer promoters - to choose or collaborate on tours but does not directly run tours itself. It is also a partner in the new North Scotland Touring Fund (NSTF) scheme, which is funded by a plethora of public agencies including Creative Scotland but is solely for dance and theatre, not music;

The Scotland On Tour meeting of Scottish music promoters and venues during Showcase Scotland at Celtic Connections - although not concerned with direct tour organisation ; and

The Scottish Jazz Federation (SJF)'s new initiative which has brought together a small number of small and mid-scale promoters with a particular interest in jazz to work with SJF and drawing on Creative Scotland funds to pilot a small number of tours. This is seen by SJF as an important step in building jazz provision.

Originated by the then Scottish Arts Council and running from 2003 to 2010 the Tune Up touring programme supported and co-ordinated a range of tours in jazz, folk/traditional, ‘world’ music, indie, experimental and contemporary chamber music. In other words, it covered the areas of music that had not generally been the subject of regular touring funds.

Tune Up was originally run in-house and subsequently contracted to independent tour producers. It aimed not only to fill gaps in the kind of live music available to audiences and promoters around Scotland - but also to underwrite their appearance in more remote or under-served localities. Behind the overall touring programme there was a collective publicity, marketing and audience development effort.

Tune Up’s apparent benefits, as related in our consultation by various of its promoters, were in extending opportunities for unusual or adventurous programming - and especially by incoming international artists. It enabled audiences across Scotland to hear otherwise rarely available ‘world’ music groups; contemporary jazz; large scale collaborations; and projects too large for any usual mid-scale touring circuit to undertake.
Criticism of Tune Up, however, suggests that the selection of groups for the annual programme could sometimes be out of step with the requirements of promoters - or could sometimes introduce artists that, despite subsidised fees and tour costs, would not generate sufficient audience interest or ticket revenue for individual promoters.

There was also the issue that some Tune Up tours, especially of Scottish-based artists, would either displace touring plans made by perhaps similar groups and promoters who were not being funded or would distort the market in fees for groups who, after a Tune Up subsidised tour, had to return to the difficulty of charging a full market-value fee to promoters.

Tune Up was suspended after 2010 by Creative Scotland, with no apparent review or evaluation of its longitudinal impact and benefits, nor of the kind of weaknesses identified here.

Our consultees were by no means united in asking for the development of a new touring system or framework for enabling tours. There were differing views on the degree of need for touring; on the ways in which any supported touring might be structured; on balancing the needs of Scottish-based and incoming artists; on the decision making necessary to produce efficient tours; and on whether touring funds should be in the hands of promoters, specialist development agencies or the artists/managers themselves.

The questions above - and prospects for music touring structures - need to be debated and resolved. What is clear from our review is that:

- Music touring overall must be viewed holistically to gain a full picture of the gaps and opportunities in provision and coverage;
- There are gaps in provision and available live performances - the examples of Tune Up tours above indicates some of the areas of concern;
- Any touring framework or strategy should be focussed first on the audience and the range of music with which they can be served;
- Any subsidised touring pattern should avoid displacing other touring work or distorting the market unfairly;
- Promoters must be engaged in consensus in order for touring patterns, if required, to be built and sustained;
• touring funding should be an added support, not a substitute for adequate direct/core/programme funding for good quality promoters;

• to be productive and benefit extended provision and audience growth, touring programmes must in general be longer-term and cumulative;

• opportunities for cross-border UK touring initiatives (via the use of the 15% rule of cross-border-subsidy by UK arts councils) have not been sufficiently explored or exploited21;

• similarly, the opportunities for partnership and partnership support from other countries’ national cultural/music agencies when planning touring by international artists has not been properly exploited and can be explored;

• a range of expertise is needed to identify appropriate areas of music to be toured and artists appropriate to Scottish audience;

• Creative Scotland’ new strand of strategic commissioning may possibly be one way of approaching tour support; and

• music touring does not operate in the same way as other art forms and should not be treated in the same ways as, say, theatre or dance.

Our suggestion is that music touring and potential developments should be studied closely and consulted upon and reviewed in order that Creative Scotland can devise a strategic approach to music touring.

3.7 Venues

Had this review been taking place in the 1990s, the response to our enquiries about the need for new or refurbished venues would undoubtedly have been a heartfelt desire to build. In 2012, after a decade and a half of Lottery Capital funding, the response from consultees has been muted.

There is a broad spread of serviceable mid-scale venues around the country in various sizes of population centres - including in the islands with such venues as An Lanntair in Stornoway, in smaller towns like Peebles with the Eastgate, and larger ones like Stirling with the Tolbooth.

21 For clarity, music was excluded from large scale cross-border touring funds unless opera or dance companies. However, there may be potential in the 15% cross-border-subsidy arrangements between the UK arts councils for all other scales of music touring.
Larger scale venues, much improved in recent years, include the City Halls and Old Fruitmarket in Glasgow, Inverness’ Eden Court Theatre and Ironworks and the Usher Hall, Edinburgh.

Promoters use a wide range of venues around the country that may not be purpose built but which serve them well enough - village halls, town halls, churches, sports halls, theatres, clubs, pubs, schools, hotels, country houses etc and more than a few unusual and attractive places for occasional use such as castles like Culzean and the mothballed Concorde in the Museum of Flight in Lammermuir. The proliferation of festivals has also not only seen occasional uses of permanent venues such as these increase, but also a considerable use of temporary structures.

Although there may still be some localities where a new or custom-built small-to mid-scale venue would be desirable (there could be a case for something in Orkney perhaps and - see below - in Edinburgh) this review does not indicate a pressing need for a major building programme. The consultation responses were much more directed towards the possibility of upgrading and improving facilities and equipment either in dedicated arts and music venues or for shared use in localities where a number of general purpose venues are in use. Alongside such physical improvements, some consultees suggested that increasing training in venue and facility management would be beneficial to the overall quality of promotions and the performing experience.

There is however a particular issue around a mid-scale venue for Edinburgh. In comparison with Glasgow, the capital city is very limited for year-round promotion of high quality music at the mid-scale, despite the Festival Fringe’s imaginative use of all manner of spaces in the summer. The Usher Hall, although it has been receiving acclaim for its programme, is generally too big - and its layout prevents the intimacy with the audience the repertoire requires - for the entire spectrum of music that will attract audiences of between 300 and 900.

The Queen’s Hall which promotes and hosts such events year-round is, by its nature, insufficiently flexible and not well suited for many such events, particularly because as a listed building any major alterations are simply not possible. This is especially true for its use by the SCO, who use it regularly because there is no suitable alternative, and who have been exploring ideas for an alternative venue.

We suggest a specific review of the mid-scale venue provision in Edinburgh - with Creative Scotland in partnership with the City of Edinburgh and others - which
should aspire to explore possible development plans over the longer-term - plans which should examine the full extent of facilities that a dedicated mid-scale venue could offer.

3.8 Listening to music

Individuals responding to our surveys listed declining audiences and the need for audience development as real issues for live music. This links with our finding that venues and promoters are increasingly under-resourced for the kind of sustained programming that can hold and develop audiences.

Sourcing comprehensive data on music audiences in Scotland is problematic. While Creative Scotland collects some audience data this relates only to the organisations that it funds, and is therefore only a part of the overall picture.

However, the popularity of music in Scotland is clear. According to the most recent data from the Scottish Household Survey\(^\text{22}\), almost a third of adults in Scotland had attended a live music event in the last 12 months. This rises to more than 40% for 16-24 year olds and is only exceeded by cinema attendance.

For much of the sector, the music audience is largely well educated and/or middle class, with opera and orchestral music attracting an older audience (see Table 3.3 in Appendix 2). In common with most cultural events, attendance at music events tends to reduce with age (opera and orchestral music apart)\(^\text{22}\).

While this data provides an interesting overview of national attendance patterns, it is too generalised to be immediately useful to promoters and music organisations trying to reach audiences.

Specific data, relevant to particular organisations and locations, has been gathered by Culture Sparks, the audience intelligence agency for Glasgow. The Source is a two year joint project between the Federation of Scottish Theatre (FST), Culture Sparks and The Audience Business (TAB), supported by Creative Scotland. It is providing a benchmarking and ongoing measure of audience behaviours and demographics by bringing together over 40 arts organisations, including major venues and the national performing arts organisations\(^\text{23}\), to share box office data,

\(^{23}\) It does not include the BBC SSO; and anecdotally this orchestra is attracting increasingly large audiences.
provide training and guidance and use collated information strategically to inform programming, marketing and operational planning.

In Glasgow, where year-round music provision is the most intense, Glasgow Life has started a two-year project collecting music audience data.

Individual music organisations or groups, and promoters or venues, do not necessarily have the technical or personnel capacity to collect or respond creatively to such data. To help their work with reaching and retaining audiences they could be encouraged to work together through support/funding agencies. In practical terms this could include:

- affordable access to a professional agency such as Culture Sparks for advice and support in framing the questions they ask about their audiences;
- access to broad thinking about how they engage with audiences and the public throughout their organisations; and
- an incentive fund to enable promoters and venues to explore programming for local audiences through partnerships with performing groups and/or touring agencies.
4. Recorded Music

4.1 Introduction

The recording industry includes composers, songwriters and recording artists, record labels, publishers and distributors. A simplified supply chain for recorded music might look like that shown below:

**Figure 4.1: Recording Industry: Simplified Supply Chain**

The recording industry revolves around the intellectual property (IP) vested in compositions. However, it is those that own and exploit that IP that typically command greatest economic returns – the record labels and publishers. As the distribution of music becomes increasingly digital, and the opportunities to exploit music across other channels increases, IP becomes ever more important. In particular, publishers play an increasingly central role in the economics of the sector, as they are responsible for the ongoing exploitation of IP. Indeed, recent research has found that publishing revenues are increasing at a time when sales of recorded music have been in decline\(^{24}\).

The recorded music industry has been on a downward trajectory for some years now. Of all of the creative industries, music was arguably the first to feel the game changing impact of digital technologies. The rapid diffusion of broadband connectivity, digital formats and peer-to-peer technology caught even the largest players in the global music industry by surprise, and the response was too slow to stem the tide of illegal downloading.

\(^{24}\) Economic Insight, PRS for Music, August 2010
These changing conditions have been very challenging for the music industry, with a five-year downward trend in sales of recorded music, and increasingly fragmented revenue streams. However, recent analysis suggests that this may be stabilising. For the first time in five years, sales of recorded music in the UK stabilised, and revenues from international licensing increased, along with ongoing strong growth in live music. Publishing revenues also grew, underlining the role of intellectual property (IP) in business success.

The recorded music industry is complex, and operates through myriad networks and commercial relationships that cross many sectors. Artists, labels, publishers, promoters, agents, pluggers and distributors engage in a much wider media environment that includes broadcasters, advertising agencies, film and TV producers, and all those involved in online activity.

4.2 Recording industry in Scotland

Overview

Reliable data on the recording industry is extremely hard to source, particularly information that can provide a clear breakdown across the different functions and activities involved in the sector.

The best source that we could find is the music database held by SMC, although many of the contacts may be out-of-date (e.g. a number of the listed record labels are no longer active) and the extent to which the database is comprehensive is not knowable. As a result, the data below should be seen as indicative only.

Scotland has a vibrant base of small independent record labels, specialising in defined genres and niche areas. From long standing companies such as Linn (classical), Greentrax (traditional), Soma (dance/electronic) and Chemikal Underground (rock/indie) to newer arrivals such as Delphian (classical) and Numbers (dance/electronic), there has always been a labels scene in Scotland.

According to the SMC database, there are 247 record companies in Scotland, broken down by genre as shown in Figure 4.1. Of these, 109 (44%) are based in the Central Belt, and 69 had no address listed in the database.

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25 ibid
Figure 4.1: Record companies in Scotland

<table>
<thead>
<tr>
<th>Genre</th>
<th>Number of companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classical</td>
<td>8</td>
</tr>
<tr>
<td>Dance</td>
<td>23</td>
</tr>
<tr>
<td>Rock/ pop</td>
<td>77</td>
</tr>
<tr>
<td>Folk/ traditional</td>
<td>53</td>
</tr>
<tr>
<td>Jazz</td>
<td>5</td>
</tr>
<tr>
<td>Mixed genre</td>
<td>41</td>
</tr>
<tr>
<td>Not classified</td>
<td>40</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>247</strong></td>
</tr>
</tbody>
</table>

Source: SMC database

The major labels have no representation in Scotland, and even the largest of Scotland’s record companies remain very small in terms both of income and employment.

The SMC database also identifies 33 publishers in Scotland, plus a further 34 for which a location is not specified, and only eight distribution companies and six online retailers. Many of the publishers are sole traders and/or artists that self-publish, and many labels now have small publishing imprints.

In terms of the physical infrastructure supporting the recording industry, the SMC database lists 85 recording studios and 23 rehearsal studios (both reasonably well distributed across Scotland), as well as 22 providers of recording services, including CD duplication. Again, a number of the studios are owned by individual musicians.

Without benchmark data for elsewhere it is difficult to draw any firm conclusions from these data. Nevertheless, these figures do suggest that:

- the recording industry in Scotland is strongly focussed on rock and pop (in line with the market generally) and to an extent folk/ traditional music, with far less provision in areas such as classical music or jazz;
- there is an inevitable concentration of activity within the central belt, but not to the complete exclusion of other parts of the country. In particular, provision of studio and rehearsal facilities appears to be reasonably well distributed across Scotland, and facilities such as Watercolour in Argyll continue to attract talent; and
distribution and retail appears to less well served than other parts of the supply chain.

More generally, the global issues highlighted above are, of course, felt in Scotland, but many of the consultees felt that the situation here was no better or worse than elsewhere. In fact, the number of labels that have continued to trade in Scotland for years now (e.g. Greentrax, Soma, Chemikal Underground, REL, Linn and Scotdisc) does suggest a degree of resilience in the face of difficult trading conditions.

In order to understand the issues and challenges facing the Scottish recorded music industries, it is useful to consider these along supply chain lines.

**Supply chain issues**

The review found no shortage of musical talent in Scotland, including high quality songwriters and composers as well as artists. This end of the supply chain is as buoyant as ever with established acts such as Phil Cunningham and Amy McDonald and emerging talent such as We Were Promised Jetpacks and Emelie Sande generating strong international interest.

The challenges in Scotland’s recording industry come further along the supply chain. Despite the longevity of some of the better known labels, life as a record label is precarious. As the price of physical product (CDs) has fallen, both as a result of digital distribution and aggressive price cutting by major retailers (supermarkets and Amazon) profit margins on CD sales have been eroded. Digital downloads have offered only partial compensation, and piracy presents a massive ongoing cost to the industry.

**Investing in talent**

The result of this, as consistently reported in the consultations, is that there is simply less money in the system. This then has a number of impacts along the supply chain. Most obviously, there is now far less investment in artist development and marketing, making it harder for music to reach its audience. This is an environment in which risk is typically pushed down the chain, ending up with the artists. It was reported that artists are frequently expected to sell CDs themselves and even sell tickets for gigs. If their label is unable to finance the initial recording, the artists may well be asked to finance it - or at least make some investment in it themselves.
This is also supported by the survey results - we found earnings amongst musicians in Scotland to be low. In the survey, 81% of the individuals that responded (46 responses) reported earning less than £19,000 in the last financial year. Only four reported earning over £30,000 in the past year (7%).

Although this cannot be considered to be a fully representative sample, it is indicative of a consistent trend in music (and indeed elsewhere in the arts), in which earnings are very unevenly distributed, and most earn very little for their creative efforts.

In times of relative plenty in the music industry, record labels were the main source of investment in the career development of musicians. With the financial retrenchment across the recording industry this investment has not been replaced, making musical careers even more precarious.

To some extent, this has always been the case, but the review suggests that this may be getting worse as the industry as a whole becomes more financially constrained.

Indeed, music organisations that completed our survey also reported generally low average earnings. The most commonly reported turnover band was less than £49,000 (plus a further 12% who reported no turnover in the last financial year (Figure 4.2). Twenty organisations reported turnover of over £1k in the last year (12%).
However, despite the general trend, two areas were reported to be generating better income in Scotland. One was traditional music, which has grown in recent years with festivals and live events and recorded music. In terms of recording, however, the labels once again report a downturn in sales and distribution even though they may be in a less extreme position than some other areas of the industry.

The other income generating area was in composing for film and other media. Four of the top ten earners on the books of PRS in Scotland are composing solely for other media, and the value of music for media coming out of Scotland exceeds that of rock and pop\(^\text{26}\). This activity goes largely ‘under the radar’ as it has virtually no public profile, and even limited visibility within large parts of the music sector itself.

It should be noted here that data are difficult to obtain due to what qualifies as being in Scotland. With so much banking being down in London, a lot of revenues collected by PRS are recorded as being in London when they are in fact earnings for Scottish artists. This relates again to wider issues with lack of reliable and accessible data on the music industry in Scotland, an issue which is undoubtedly a constraint on effective policy making and evaluation in Scotland.

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\(^{26}\) It should be noted here that data are difficult to obtain due to what qualifies as being in Scotland. With so much banking being down in London, a lot of revenues collected by PRS are recorded as being in London when they are in fact earnings for Scottish artists.
For **labels**, the challenges are many:

- piracy eroding revenues from physical and digital sales;
- lack of distribution and retail opportunities (there is real pressure on independent records shops and even established chains such as HMV now carry far less catalogue in favour of DVD and games);
- limited finance to invest in artist development and marketing, making it hard to take acts to the ‘next level’;
- limited support for Scottish music from the media, particularly radio; and
- challenges in retaining intellectual property (within the sector) for subsequent commercialisation.

**Limited investment** is perhaps the critical issue facing record companies. The history of the Scottish music industry is littered with stories of labels that could not compete with the investment offered by larger companies down south and as a result lost bands that went on to achieve considerable commercial success – Daft Punk, Mogwai and Franz Ferdinand are all examples. It is therefore very difficult for the Scottish music industry to retain talent and the IP that can generate income.

Despite the challenges, the consultations did identify a number of labels that were considered to be doing well, despite the difficult trading conditions, and the traditional sector was felt to be have been particularly strong in international markets in recent years and therefore, despite the economic retrenchment, was still finding sales. In fact, almost 30% of the organisations in our survey reported income from overseas (although not all are labels), an encouraging indication of the international reach of music in Scotland.

**Publishing**

Most agreed that there are still significant opportunities in **publishing**, but there are no publishers of scale in Scotland. If an artist is signed to a label outwith Scotland, it is very unlikely that the publishing would stay here. Instead, many labels and artists self-publish, seeking to earn additional income from licensing, particularly through the growing synchronisation (sync) market (licensing music for other media such as TV and computer games).
According to PRS for Music, sync income has been increasing in Scotland, but not as fast as might be expected, and there are few, if any, agents with the market connections to secure substantial sync deals. In addition, the opportunities within Scotland for these kinds of deals are also limited by the relatively modest scale of the film, TV and games sectors compared to global centres such as London. As a result, much of this activity remains concentrated in the major centres such as London, and in any case, sync income depends on IP ownership, an acknowledged challenge for the sector in Scotland (due to lack of investment, as highlighted above). Indeed, only 2% of those surveyed reported any sync income, compared to 16% reporting income from CD sales and 15% from digital sales.

This is consistent with feedback from the consultations that while there are examples of productive collaborations and linkages between music and the wider creative industries in Scotland, these remain somewhat limited. However, sectors like film, TV and games are all active in Scotland and while their overall scale is smaller than places like London, or even Manchester, there are undoubtedly untapped opportunities for music businesses and musicians in these areas.

Manufacturing, retail and distribution

Were this review conducted ten years ago, the relative lack of manufacturing capability in Scotland (e.g. CD pressing) would have been identified as a significant issue. This is arguably less relevant in today’s market in which digital sales are growing daily. However, given that physical product will not disappear yet, it may be important that Scotland is able to hold onto what little manufacturing is left.

Further up the supply chain, there are two areas of long standing weakness in the Scottish music industry – distribution and retail. In the digital environment, the nature of distribution is changing, but this has not diminished completely the need for physical distribution. Despite the longevity of Scotdisc’s distribution business, Scotland has long struggled in this area of the sector with very few distributors of scale and reach operating north of the border.

Retail outlets are also fast reducing both as a result of the aggressive price-cutting of the supermarkets and online retailers like Amazon and Play.com, and the rise in digital distribution (and piracy). However, with buying increasingly centralised within large retailers, getting shelf space is extremely difficult, not least because even

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27 These are percentages of all organisations that responded to the survey and not just labels or publishers.
specialist retailers such as HMV prioritise DVD and games over less profitable CDs. Specialist music retailers that once offered greater distribution opportunity to Scottish labels have largely disappeared.

Digital

As noted above, the recorded music industry was fundamentally changed by the rise of internet access and digital storage technologies. The global story of file sharing and the reluctance of the major labels to embrace the digital future is well known and need not be rehearsed again here, save to acknowledge the scale of impact on recorded music revenues.

However, the digital revolution extends further than digital downloads and file sharing. The internet has provided a platform for accessing music on an unprecedented scale. For example, YouTube is a massive repository of all kinds of music (available for free) and is an increasingly important promotional tool for record companies and artists alike. Together with online streaming services like Spotify, these new services start to challenge the very nature of music ‘ownership’ – why pay to own something that you can simply access for free (or for a modest monthly subscription) at any time via your computer or phone? The longer term impacts of these new digital platforms are not yet clear, but their significance is undeniable.

Music blogs have also risen in power and influence, with knock on effects on sales of printed music press and its role as a tastemaker, and digital radio offers new opportunities for labels and artist to reach audiences.

Then there are the growing opportunities for cross platform promotion. Although music was a fundamental part of the film and television industries long before digital technologies started to transform these sectors, digital formats have not only extended these markets but have also opened up new opportunities in areas like computer games.

It is also important to note that it is not just the recorded music industry that has been affected by the digital revolution (recognising also the difficulty of separating the live and recording industries). Live music has also been profoundly changed, not least by the development of online ticketing which in turn has facilitated the rise of global promotion via companies like Live Nation.
In Scotland, forward thinking companies such as Inner Ear are very actively engaged in this digital space, seeking new business models for music content in the online marketplace. However, for many, the digital environment remains a poorly understood market in which engagement is limited to downloads and promotion via social media. Even then, the extent to which Scottish artists are fully exploiting the promotional opportunities of digital media is debatable and may be an area of as yet under-realised potential.

Broadcasting

One area of distribution worthy of specific mention is broadcast media. For many in the sector, Scotland’s broadcasting industry, and that of the UK, is seen as largely failing the local music scene.

Although most consultees were able to identify exceptions – mainly radio shows – most felt that Scottish music is rarely promoted on either radio of television in Scotland. The consolidation of commercial radio in Scotland, and the commercial pressures affecting that sector, have led to a more mainstream programming policy, with less space for experimentation and local music.

Even BBC Scotland was seen as underperforming in this respect, despite some efforts to broadcast more music from Scotland. However, competitive internal markets within the BBC are such that BBC Scotland cannot always secure the broadcasts it might like, though it has a strong record in classical and traditional music.

These concerns sit in sharp contrast to the policies adopted in places like Canada and France, where quotas are set for radio stations to play a proportion of indigenous music. Many highlighted these policies as examples of good practice that had significantly helped the music industries in these countries.

Print media fared little better, with a general feeling that the press in Scotland is overly negative and generally unsupportive of the local music industry.

Management

Finally, the Scottish music industry has limited choice in key support services such as agents, managers and professional services. Despite the listing of 46 agents and managers within the SMC database, the consultation consistently identified
issues with the range and quality of agents and managers in Scotland (with notable exceptions). In particular, there were concerns raised about the development of a next generation of agents and managers.

This point is again related to reducing earnings in the sector. Agents and managers are paid a proportion of artists’ earnings and if artist are not earning enough then there is not sufficient money in the system to support this layer of the supply chain, at least not in depth.

There is a similar constraint on the provision of professional services to the sector - in particular specialist lawyers and accountants. There is simply not the critical mass of business opportunity to support specialist professional services providers in Scotland with the result that bands and labels either use generalists or source this expertise beyond Scotland (at additional cost).

Creative Scotland

It is worth highlighting the role of Creative Scotland in supporting the recording industry in Scotland. Although much of Creative Scotland’s support for music is directed towards the non-commercial ends of the spectrum (for want of a better term) two areas of activity are worth particular mention:

- through the Quality Production funding stream, it has invested in the recording of 49 albums across a diverse range of genres; and
- the organisation is developing its interest in IP, and in supporting the generation and exploitation of IP by creative organisation in Scotland. To this end, it has invested in a Knowledge Transfer Partnership (KTP) with the University of St Andrews to support a two year placement in the organisation to develop its approach to IP.

Implications

The issue for Creative Scotland and its partners is to determine which of the issues facing the recording industry, if any, makes a material difference to the health of music in Scotland, and this will depend on the lens through which one views the sector.

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28 a comment was removed about Creative Scotland being alone amongst its UK counterparts in investing in recordings as the Arts Council England provides funding to NMC Recordings. See Appendix A: Amendments, No. 2.
At a simplistic level, a purely economic analysis would identify major challenges with the ability of the Scottish music industry to retain key talent - or more accurately the income of key talent - and IP within Scotland. This constrains income generation and limits growth, and would therefore be a prime area for possible intervention. On the other hand, a purely cultural view would likely be more sanguine on the exodus of income and IP from Scotland, so long as Scottish talent can reach thrive and reach an audience.

The reality lies somewhere in between these two extremes. It is crucially important that the music sector can thrive economically if artistic talent is to be given the greatest opportunity to develop. At the same time, it is also important to guard against false parochialism, and celebrate the success of Scottish artists at an international level. However, it is of paramount importance for the economic well being of the sector that more content ownership is kept within the Scottish industry.

There are a number of opportunities to strengthen the Scottish recording industry. These might include:

- improving access to finance for record labels to enable greater investment in artist development and marketing, supporting the retention of more IP in Scotland;
- supporting labels to invest in new talent and new recordings;
- encouraging labels and songwriters/composers to join the relevant collecting societies and maximise potential income from all sources;
- mentoring support for music businesses to improve awareness and understanding of changing market opportunities and business strategy;
- developing commercial and entrepreneurial skills across the sector;
- encouraging growth in publishing businesses;
- greater linkages between music and the wider creative industries to facilitate productive collaborations and sync opportunities; and
- supporting the internationalisation of music businesses in Scotland - via support for showcasing and international representation as outlined in the International section of this report.

It is worth noting that these suggestions are primarily focussed on growing, or at least sustaining, the recorded music industry in Scotland. It is important to bear in
mind the different economics of music as a product (recorded music) and music as a service (live music). Indeed, the majority of Scotland’s musicians earn more money from the latter than the former.
5. International

5.1 Introduction

In the years since devolution, international relationships, culture and creative industries and cultural identity have all gained importance as policy issues for Scotland’s government and public agencies. The connections between these issues have also become apparent in terms of policy-making. The Government’s International Framework, published in April 2008, not only recognises these connections but specifically nominates Creative Scotland as one of the agencies which will play a part in future international activity.

Creative Scotland has set out an aspirational statement of its intentions to develop much further in this area and has swiftly built its international engagement in its first two years - and nowhere more so than in the area of music.

Scottish composers and performers have always been represented on the international scene, by dint of sheer creative talent rather than any official support. But this determined broadening of governmental and public agency horizons for culture and the creative industries, developed with care, will offer the music scene some of its most positive and encouraging opportunities in the coming years.

Our review has found itself well-placed to note the energetic and prolific work that is being undertaken on the international scene at the moment and to offer observations on the ways in which Creative Scotland and others might make best use of international activity and resources in future.

In the course of our review we took the opportunity to take a brief glance at the international activities of countries elsewhere. The majority of European states, for instance, have some kind of international support or export programmes but they differ widely in scope and modus operandi.

As an example, Finland has a policy, backed by both the ministries of trade and culture, of targeting receptive countries - currently the UK - with a two-year programme of subsidised export and showcasing support for the entire range of musical styles. The programme is co-ordinated on behalf of the government by a
music specialist organisation, which backs up the approaches to UK promoters with training and preparation for Finnish musicians in how to understand the UK market and maximise the effectiveness of their entry into it.

As another example, France has professionally staffed Bureaux d'Export for music in several international capital cities (including London), supporting commercial music promotion, whilst other cultural agencies (such as the jazz festivals association AFIJMA) are funded by various arms of government and other agencies to run long-term programmes of support for French artists of their genre abroad as well as long-term projects of exchange and collaboration (such as the Jazz Shuttle project currently launched with the UK and also supported by the rights collecting organisation SACEM).

Although not offered as any kind of study for this part of our review, glimpses of these and other countries' work in music export are useful in offering indications of possible policy and strategy options - and might be studied in proper detail if the value of various kinds of international activity were to be assessed in the course of developing a strategy for Scotland.

5.2 Down South

Scottish artists have always been a part of the UK scene and vice versa. The question post-devolution, however, is how much more value and opportunity can Scotland derive from a market and a population of 55-plus million people on its doorstep, without any of the hurdles (language, currency, transport, permits etc.) associated with international activity?

English audiences, and to an extent those in Wales and Northern Ireland, are not as aware of the range of Scottish arts, culture and music (or history, or landscape or tourism interest) as might be supposed.

Some recent showcasing activities - e.g. Scottish artists supported to appear at Cambridge Folk or London Jazz Festivals or the Wigmore Hall - have produced significant profile and recognition in the media and with music professionals ‘down south’.

In the classical sector, the Edinburgh International Festival (EIF) is a major opportunity although the Festival, rightly, reserves the right to choose which organisations and projects it programmes each year. Several interviewees
suggested that a showcase of Scottish work during the Festival (perhaps promoted with the British Council) targeting agents and international promoters as well as the public, would be very valuable.

The other major centre for showcasing the UK’s live classical music is London, and all the orchestras take part in the BBC proms in the summer. The Hebrides and Scottish Ensembles perform at the Wigmore Hall, and Red Note appeared at the Southbank for the first time this year. Other UK promoters and festivals do not usually have the resources to bring an ensemble in from Scotland.

In collaboration or exchange - dealing with incoming activity as well as the ‘export’ of music from Scotland - there are opportunities that hold more value than is currently being realised. The exploitation and expansion of reciprocal understandings - for instance the so-called 15% rule - allowing a proportion of subsidies from one UK country’s cultural agency to be spent in other UK nations - could be pursued, and the principle extended, to benefit artists and audiences.

Irrespective of any political implications that it may hold, Scotland would benefit from a strategy in music that is designed to deal with the rest of the UK based on the same principles as an international strategy.

5.3 Current and future activity

International activities that are currently in place in Scotland divide into outgoing (or export) - Scottish music reaching out to the rest of the world - and incoming (or import) - music from the rest of the world coming to Scotland. There are of course aspects of each that mix with the other. Similarly, the several different categories of international activity, with their differing rationales, also often serve more than one purpose. The basic categories and their purposes are:

- export - primarily economic - aiming to increase work and earnings generated outwith Scotland;
- cultural representation - to maintain Scotland’s profile on the international scene;
- cultural diplomacy - providing an element of ‘soft power’ in overall foreign relations;
- tourism and ‘place’ marketing - drawing attention to Scotland as an attractive destination;
- artistic development - supporting Scottish artists and producers to develop and helping audiences to have access to international artists;
- networking - playing a part in international liaison and collaboration at various levels; and
- intercultural dialogue and exchange - connecting Scottish music and audiences with other music and cultures.

5.3.1 Supporting agencies

The importance of music in international and in economic terms has now been recognised by most public agencies (in itself a significant advance in the past decade or so). Interventions and investments in music are being made by the Scottish Government; Creative Scotland; HIE; SE/SDI; Visit Scotland; Event Scotland; some local authorities; British Council; and UKTI.

With their different roles and objectives, these organisations have taken a variety of approaches and actions, some of which (such as HIE’s) are more long-term and strategically structured than others.

The setting up of the SCIP group - and the Music Reference Group within it - has already brought more liaison between most of these public agencies. Although SCIP is not primarily an international grouping, the SCIP Music Reference Group report of 2011 identifies collaboration to increase international competitiveness as a key aim.

At present, however, there is no clear matrix of the international initiatives, policy and strategy directions, funding imperatives and criteria of all the various agencies involved in supporting Scottish music abroad. On general observation they do not appear to dovetail or complement one another in a systematic or coherent fashion, although several of the agencies do partner one another in specific activities. The

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30 The members of SCIP are: Creative Scotland; SE; HIE; Scottish Funding Council; COSLA; VisitScotland; and Event Scotland.
place of UK-based agencies (UKTI and British Council), also involved in international Scottish activities, is unclear in the mix of other purely Scottish agencies.

Whilst there is a fair consensus about the general value of international support for music - and evaluation and data evidence exists for various projects and initiatives - there is no body of consistent and comparable information that the various agencies might share in order to enhance their own or collective work in this field.

Although some of the issues surrounding international support are far wider than just issues concerned with music, Creative Scotland is well-placed as an organisation to broker clarity and collaborative understanding at least about music-specific international initiatives across the public sector. It can also bring music sector expertise and advice to some of the other agencies which are not as familiar with the scope and needs of the sector.

5.4 Export

5.4.1 Showcasing

The most prevalent activity for supporting Scottish artists is live showcasing to music professionals - either in overseas events or in events staged at home to which overseas professionals are invited. To be effective the showcases must be focussed in terms of their genre and target professional audience.

Scotland’s highest profile (and most successful) showcasing event is **Showcase Scotland** at Celtic Connections. The event focuses on Scottish traditional music and targets traditional music professionals from around the world. Over five days during Celtic Connections delegates have access to (public) gigs by selected Scottish artists. There is a trade fair, receptions and networking events within the five days and the organisers supply contact information on the featured artists, agents, delegates and other relevant organisations. The strength of the showcase’s attraction to overseas professionals has allowed it to invite partner countries to share an element of the event - featuring a different country each year.

Further details of the extent of Showcase Scotland’s reach and results can be found as **Case Study 1** in **Appendix 4**. Evaluative reporting of this kind is invaluable in tracking the impact and effectiveness of showcases (and other kinds of support programmes) and demonstrating economic return. Various showcase operators do
produce evaluations but these are not easy to compare or amalgamate into an overall picture.

Other notable showcases include:

- **GoNorth**, the annual showcase and music industry event organised by the HIE-supported creative industries agency GoEvents. Staged in recent years in Inverness it features a wide programme over two days of around 70 gigs by Highland, Scottish and some UK and overseas bands, generally from the rock/indie/singer-songwriter spectrum. Industry delegates are attracted from Scotland, the UK and overseas and can also participate in panels and discussion sessions;

- **South by South West in Austin Texas**. Formerly run by Creative Scotland in partnership with independent promoters, and now organised by the SMIA, the Scottish programme has supported and featured (approximately 12) bands in multiple performances each year. The event is a vast programme of live events throughout the city over one weekend in March, mostly free to the public and to thousands of industry professionals from around the world who are searching for new talent in indie and rock music. There have been a number of success stories from Scottish bands supported to play SXSW and the event also features a trade expo (which the Scottish delegation attends as exhibitors) and a range of seminars. However, once again, there is a need for more formal evaluation of the considerable funding and effort that has gone into SXSW in order to understand more fully its value for money and impact on the music industry in Scotland;

- the SJF, and on occasions in collaboration with GIJF, has presented showcases to international professionals both at home and abroad, including at least one Scottish group in a UK showcase at the annual jazzahead! expo in Germany;

- the **Homegrown** programme of Scottish groups at GIJF invites UK and European promoters to a number of gigs during the jazz festival; and

- the Rochester Jazz Festival, NY State, USA, has liaised with SJF for three years to choose a small number of Scottish groups as part of the Made in the UK programme.
Opportunity knocks

The events in the section above represent the current scope of regular, structured showcases directly targeted at music professionals and aimed at increasing opportunities for Scottish music overseas. There are occasional showcases in other situations. For example:

- in 2009, SJF and GIJF took a one-off opportunity to present Scottish jazz groups to circa 80 professionals from 25 European countries in a concert series during the Europe Jazz Network annual assembly which was hosted that year in Glasgow;
- building on connections with the WOMEX expo and relationships with public agencies in Wales, it is planned to feature Scottish performances at the 2013 WOMEX in Cardiff;
- Creative Scotland supported a Scottish presence at the new Great Escape indie industry event in Brighton and at Eurosonic in Holland, while traditional musicians were showcased at Le Grande Rencontre (in Montreal) and in Scotland Week (New York); and
- the new Classical Next trade event, an offshoot of WOMEX focussing on classical and chamber music, was held in Germany for the first time this year. A small Scottish delegation attended including representatives of the Red Note Ensemble but was not part of the live showcase programme.

Classical, especially chamber music is the main area in which few showcase opportunities of any scope exist elsewhere - and for which there have been no specific arrangements mooted for a Scottish-organised event. Although perhaps a smaller field, in terms of Scottish groups available to be showcased, this increasingly strong sub-sector of our music scene is clear about the need for an active, structured approach to export promotion and of its potential benefits.

The main messages on showcasing from our consultation with the sector were clear. Effective showcases need a **critical mass of performances** and of **professionals in attendance**. They are best run by **specialists** in their field or genre, who understand their own area and its ways of operating.

One-off opportunities may be useful as testers but **long-term showcases work best** in building the trust and confidence of international professionals. Evaluation
and consistent analysis of the outcomes of showcases is essential but not always tracked and reviewed on a regular, long-term basis - nor on any commonly-agreed structure that would allow an amalgamated national picture to be accurately formed. Public agencies vary in their level of understanding of the sector. As noted above, this is an area in which Creative Scotland’s expertise can be of great value if collaborative planning and evaluation takes place.

The most obvious gap in support for showcasing is the provision of follow-up support over a period of time - whether for artists being taken up by overseas promoters or for ways of extending the reach of the showcase and building on opportunities.

5.4.2 Expos, trade fairs, networking and similar events

Scottish representation at international professional and industry events has been impressively energetic in recent years. As well as presenting trade stands or delegations at the long list of events noted above, Creative Scotland, or individuals and organisations supported by Creative Scotland, have been flying the flag at ISPA - for major international performing arts organisations; APAP - key North American promoters; MIDEM - the record industry trade fair; and Celtic Colours - the major traditional music event in Cape Breton.

It is essential for Scotland to be ‘in the game’ over the long term by this kind of international representation - whether directly by Creative Scotland or, as appropriate, by specialist organisations. SMC, for instance, cannot function internationally without membership of IAMIC; similarly, SJF’s ability to network and liaise with similar federations makes European Jazz Network membership essential.

Creative Scotland's representation on the board of the European Music Council (EMC) and thus its input to the affiliated International Music Council (IMC) is a clear example of how Creative Scotland itself can play and influential part in international networks. Such a presence not only assists Creative Scotland's overview of the music sector but also makes its mark in terms of Scotland’s cultural representation in organisational terms (also see the section below).

The question is how are Creative Scotland’s resources - human and financial - to be organised to make a long-term programme for itself and for funded organisations possible - and which other agencies can be regular partners?
5.4.3 Cultural representation

The strength and quality of Scottish music is confirmed continually on the international stage by a host of artists who tour and gig abroad regularly (and composers whose work is regularly performed elsewhere).

There are, however, an increasing number of opportunities to feature a concentration of Scottish music in high profile cultural events, which are being secured by support from Creative Scotland, the Scottish Government or other public agencies. These events are generally public performances which, although they may have professionals in the audience, are primarily directed towards raising the music’s profile to audiences and media.

Creative Scotland’s support has been significant in underwriting clusters of Scottish performances in such high profile events as Cambridge and Sidmouth folk festivals, Denmark’s Tonder festival of traditional music, London Jazz Festival, a Kings Place (London) residency programme by Lau, and elements of the Rochester Jazz Festival’s programme and associated gigs in two Canadian jazz festivals.

In chamber music Creative Scotland has been able, for example, to assist the Scottish Ensemble’s to tour the USA; the Hebrides Ensemble to appear in Holland; and chamber groups to appear in other high profile ‘shop windows’ such as London’s Wigmore Hall.

5.4.4 Cultural diplomacy

Although it blends with and serves a number of economic and cultural objectives, the primary purpose of cultural diplomacy is to provide the soundtrack to the development of international relationships and realisation of foreign policy objectives.

Since devolution the opportunities for Scottish cultural diplomacy have grown significantly. Alongside funding Creative Scotland and other agencies for their various kinds of international activity, the Government’s direct contribution to cultural diplomacy through music is by the provision of an international fund of £350K reserved for the directly-funded National Companies. With financial support from this fund the SCO, RSNO and Scottish Opera have all begun to perform and tour abroad after a prolonged period without overseas work.
The International Framework is a statement of where and for what reasons the Government’s international engagements are to be focussed - which therefore provides a guide to the National Companies’ targets for overseas work. The Government has also made brief but clear statements of its rationale for sponsoring such work. The companies are supported to:

“Represent Scotland internationally, both in promotional terms and as a demonstration of the excellence of Scotland’s culture”

The Scottish Ensemble has also been supported for work abroad which, while it helps develop the group’s international reputation, also fulfils a diplomatic role - as in its tour of China, supported by the British Council and Creative Scotland, or its Brussels performance to celebrate St Andrew’s Day for the Scottish Government.

Our consultation found general approval for the Government’s support for the orchestras abroad. There was, however, an important and obvious question: why is the Government's only officially directly supported musical diplomacy restricted to classical (and almost entirely orchestral) music? Support through Creative Scotland as the Government’s cultural agency clearly extends to many areas of music but for some this may not have quite the same resonance.

5.4.5 Scotland the Best - attracting the world to Scotland

The appearances of Scottish groups in showcases, cultural events and as cultural ambassadors can all carry positive messages about the attraction of Scotland as a place to visit or to work. Some projects, however, are specifically designed to promote tourism and inward investment, such as the annual Scotland Week programme in New York, sponsored by the Scottish Government and led by SDI and Visit Scotland.

Major special events - visitor attractions such as the Ryder Cup and the Commonwealth Games - are flanked by the added attraction of music programmes, with support from the various public agencies involved, including Creative Scotland.

Visit Scotland uses festivals and music events and venues as key points of interest. Festival economic impact studies32 have proved a compelling argument for many local authorities and tourist agencies to contribute funding or other support to their

32 See as just one recent example: Edinburgh Festivals Impact Study Report - May 2011 - BOP Consulting
festivals. And Glasgow, with its high concentration of music activity of all kinds, won the status of UNESCO City of Music as part of its long-term policy of economic development through culture.

One-off international music events, brought here by various interest groups, have the multiple effects of raising Scotland’s cultural profile in the field of music; offering a positive view of the country which will be carried away and disseminated by opinion-formers in that field; and introducing economic benefits via the visiting delegates.

The European Brass Band competition, for example, is to be held in Scotland in 2013. 2009 saw the Europe Jazz Network’s members from 23 countries able to appreciate Glasgow as a centre of music during their annual general assembly, and the World Piping Championships brings not only the piping world’s attention but an economic benefit of £14 million to the host city each year. Creative Scotland has been instrumental in attracting the 2013 EMC conference to Glasgow, the PERL employers’ association to Edinburgh - and is supporting a renewed bid for the WOMEX expo for 2015 or 16.

5.4.6 Intercultural dialogue, exchange, and artistic development

Membership of networks and the opportunity to see projects and meet artists and professionals in other countries can often result in new collaborations (as well as the kind of cultural representation and attraction for events discussed above). Recent examples of international cooperation and exchange bear this out.

The Sound Festival’s Three Cities project not only links the Aberdeen(shire) festival with those in St Peterburg and Bergen but also doubles up the link by connecting music departments in each of the cities’ universities. GoNorth’s links with similar events have enabled them to participate in the EU-funded ‘Excite’ collaboration with festivals in Denmark, Belgium and the Netherlands.

Part of the Creative Scotland International funding strand relates to these kinds of collaborations. The British Council’s policy in music has given high priority to creating and supporting inter-cultural artistic projects. It is important that British Council music policy is seen in this light - as an enabler of dialogue rather than as a funder or export agent for British music.
Exchange and training projects for Scottish producers and cultural activists on an international level are essential if the music scene is to be permanently connected in the wider world. Creative Scotland’s support for three long-term ISPA scholarships is an example of placing Scots in the middle of an international network of performing arts organisers.

Regular membership of network organisations also promotes inter-cultural dialogue both amongst musicians and organisers. Valuable contacts have been made and activity generated through various of Scotland’s organisations’ membership of international networks - the list is long and includes such forums as IAMIC, EMC and IMC, ISPA and EJN.

5.4.7 Exporting music - policy and strategy

To summarise the current state of play: Scottish musicians and bands have always been active in pursuing international opportunities for themselves and this will always be a critical element for Scotland’s success overseas. But with the increasing recognition of the importance of the creative industries, Creative Scotland, organisations they fund, the Government and their public bodies are purposefully pursuing a range of projects which are supporting and extending international reach in music. Opportunities are being taken and individual initiatives pursued as and when they arise and serious efforts are being applied to make those opportunities productive and beneficial.

The range of work currently being done is already a considerable asset. So is the establishment of the SCIP Music Reference Group - which has brought together several of the agencies involved and established a declaration of shared ambition.

The Scottish Government’s International Framework (and funding for the National Companies to work abroad) provides another key part of future activity.

The international aspirations of Creative Scotland’s current Corporate Plan are wisely framed to provide a starting point and research period for the development of longer-term international strategies. Those aspirations are mirrored by the broad reach of the international funding strands which clearly encourage applicants to explore the artistic and economic potential of international activity.

Given the stage on which all these public agencies are operating - i.e. the whole world - and the capacity, however much extended, that public bodies and music
organisations have to undertake international promotion - there is a need to agree a strategy for Scotland’s international activity, with a number of strands specific to the music in question and a definition of the part that each organisation is able to play within the overall picture.

The overall pattern of supported international activity to date has been driven by opportunity and engagement of different kinds for good but differing reasons. The effect is of a scatter-shot process rather than a focussed programme. This review seems to mark the right point at which to draw together the information and experience produced by the work to date of all agencies involved in international support and formulate a focussed, coherent, long term evidence-based strategy that can build on such successful beginnings and can be reviewed at intervals in the light of the subsequent evaluations and data produced.

Creative Scotland is well-placed to lead on this process. This review and our observations lead us to suggest some of the principles on which a strategy could be based.

- **long term commitment** is essential for cornerstone showcases and other regular events - from Creative Scotland and from other partners;
- **mutual understanding and dovetailing** of each other’s organisational policy, criteria and resources is needed underpin a coherently planned programme;
- there is no need for a central dedicated ‘music export’ agency if the individual organisations responsible for their own field convene regularly with Creative Scotland and other agencies to monitor and share experience;
- appropriate specialist music organisations (e.g. SMIA, SJF, the Showcase Scotland advisers and a possible chamber music grouping) should be asked to review the export support options for their genre (e.g. which showcases, trade fairs etc. for participation) and **propose a programme** to Creative Scotland and the other funding partners;
- partners, including Creative Scotland, may also want to propose their own programme, with appropriate representation on international bodies (e.g. EMC);
part of the strategy should address the need for artists, producers and other music professionals to **network internationally** and gain contacts, skills and experience in international working;

it is important to consider the **needs of music** specifically - there may be parallels with other artforms but music needs not general policy should lead;

international target countries/ regions should be agreed according to the realities of the musical **genre** and its market opportunities;

the organisations leading on any export support programme should be the **specialists** in their field;

the artists to be given assistance must be appropriately **ready** for developing their international work - and must be actively engaged in the process;

all activities must be regularly and consistently **evaluated** against their own appropriate planned objectives - and should contribute consistent data to further the understanding of their impact and value ;

the organisations and the funding partners must allow for **follow-up work** or support to be available for artists after initial showcase or export assistance;

there should be **flexibility** to accommodate beneficial but unexpected opportunities. Project funding may take care of these but more stable long-term support should be committed to long-term programmes of activity;

differentiation should be made between economic export and the other categories, mainly cultural diplomacy and intercultural dialogue;

Creative Scotland should consider encouraging the Scottish Government to broaden the range of music it considers for the purpose of directly financed cultural diplomacy; and

a similar set of guiding principles should be developed to provide a guiding overview and strategy of support for tourism attraction and inward investment opportunities.
5.5 Import

Bringing music from other countries to Scotland is an important part of the mix of the live music scene. It is part of providing the best possible range of music for audiences to enjoy - and it also can provide inspiration, stimulus and artistic benchmarks to which musicians here can relate.

The sections of this review about promoters, festivals and touring indicate some of the ways in which overseas orchestras and bands can be heard. The annual extravaganzas of the EIF and Celtic Connections may be the most immediately notable examples of extensive international programming but a number of other festivals - for example Hebridean Celtic, Sound, Shetland Folk, St Magnus and, to an extent, Glasgow and Edinburgh jazz festivals - also make a significant feature of international work each year.

However it is worth noting that visits to Scotland by professional orchestras are mainly confined to the EIF and to the limited seasons promoted or hosted by the Usher Hall in Edinburgh and the Glasgow Royal Concert Hall/City Halls management of Glasgow Life.

Outwith the festivals, as we have seen, international artists are promoted or toured when they are financially viable - but there is a wide spectrum of musical genres that are poorly represented in year-round programming across the country. The prime issues for these gaps are, as outlined in the Live Music section:

- constraints on programme budgets and therefore on risk taking;
- lack of touring by international artists;
- limitations on marketing and audience development; and
- limitations of international experience, contacts and knowledge amongst promoters and producers.

These issues often have obvious circular, self-fulfilling negative effects. What can Creative Scotland do to help break down these barriers to a more confident, outgoing approach to international programming? There are already international funding strands that provide opportunities for research and ‘go and see’ which Creative Scotland can encourage music promoters of all kinds to access.
But rather than concentrate attention solely on a strand specifically for international work, it might be possible for Creative Scotland to highlight international thinking (as and when appropriate) to be an interesting and positive element in the criteria for other funding strands - and in particular those for festivals, touring and programming.

There are many good examples of Scottish promoters and producers making contacts with and securing support from overseas cultural agencies. For the most part these are individual initiatives, which will continue and will continue to be given credit and support from Creative Scotland.

Creative Scotland’s broader plan is to build relationships with the consular and similar diplomatic and cultural agencies which represent their countries in Scotland. The different country partners attached to Showcase Scotland each year is a prime example of practical action. Beginning with those already present and extending to the agencies that may only have a UK base in London, Creative Scotland can create links and make introductions between them and appropriate Scottish music and cultural organisations. A long-term programme of this kind will not only help access more support for artists and projects from other countries - it will also provide a mutual benefit to those overseas agencies in assisting them in improving their cultural representations in the UK and Scotland.

The responsibility for this kind of liaison, of course, is not purely on the shoulders of Creative Scotland. There are many excellent examples of music sector artists and organisations making strong links for themselves with overseas agencies and these are to be celebrated and encouraged whether or not Scotland’s public agencies have taken an active part.
6. Music Education and Youth Music

6.1 Introduction

Throughout our consultation music education was of enormous concern and interest. On the rating table of ‘aspects of the music sector in Scotland’ in our on-line survey, ‘music education in schools’ received the highest number of entries from both individuals and organisations, almost equally split between rating it poor/very poor and good/very good. Music education is a wide and multifarious sector and this split in opinions indicates that viewpoints inevitably differ in respect of what part of the sector (or of the country) is being focussed upon. The tension between areas of admirable strength and success and issues of weak or below-par provision is the clearest indication of a need for a comprehensive strategic overview.

To an extent, reviewing formal sector music education is outside the scope of this review, since music in schools, the instrumental services and colleges are under the aegis of local authorities or government regulation. But since the music sector is predicated on people being able to learn about music and how to make it, we will consider how the formal sector is operating and how the music world sees it.

Over the past two or three decades there has been exponential growth in the informal music education sector (i.e. organised activity outside the formal statutory education sector or instrumental instruction via local authority provision). Most orchestras, bands, promoters or festivals now include a significant element of education within their annual activity and some organisations have developed with the sole purpose of providing specialist music education.

Often financially supported through arts sources, the informal sector also grew swiftly with the advent of Lottery funding. In 2002, the additional resources available to music education in both informal and formal sectors were multiplied several times over by the introduction of £17.5m over three years for the Youth Music Initiative (YMI). This was then increased to a stable £10m per annum. By devolving responsibility for managing this (now) £10m annual fund to the then-SAC, the Scottish Executive Government brought SAC - and now Creative Scotland - into an influential position within music education.

34 See Table 4.2 in Appendix 4
6.2 What’s Going On Now?

The report that prompted the YMI, *What’s Going On*, detailed music provision for young people throughout Scotland and identified areas and issues of concern. The tenth anniversary of YMI provides a good opportunity to take another look at youth music and music education, and to consider long-term national strategy.

General observations from our consultees about music education and youth music came across loud and clear. We heard that:

- the YMI is welcomed and praised for making a difference;
- the informal sector’s contribution has grown rapidly in strength and quality;
- education by specialist organisations (e.g. jazz, pop/rock, brass bands, piping) has been growing in scope, confidence and influence (especially for traditional and Gaelic music);
- music education is still not sufficiently embedded across all ages and stages of formal education;
- the scope and quality of music education that many young people receive is often (too) dependent on the (much valued) skills and commitment of individual teachers and leaders;
- free instrumental teaching is being eroded;
- pathways of progression - where and how to move forward - are not always clear for young players or their teachers and leaders;
- there is no central overview or forum in which music education and youth music can be considered and strategically developed;
- policy making is widely dispersed - there is no collective agenda; and
- overall government policies offer sufficient scope for developments in music education without alterations in the underlying general framework.
6.3 In schools

In dozens of reports, newsletters, websites and in our interviews we encountered so many examples of enthusiastic pupils and inspiring teachers enjoying all manner of imaginative music projects that the picture must include a great deal of vitality and hope for future developments.

However, we also found, a strong sense of anxiety across the board about threats to those prospects. The state school sector came in for a good deal of criticism - including the fact that across the country the quality and scope of what is provided in music is extremely variable.

Whilst opening up access to music for more children, especially since the advent of the YMI, state music education is widely seen as falling behind the private schools sector in levels of training and achievement of talented young musicians. Some interviewees spoke of a ‘dumbing down’ approach - music classes being taken as an easy option because of a lack of rigorous and disciplined learning.

Music was not being properly exploited for its value in creativity and cross-curriculum learning, despite the emphasis placed on creativity in the Curriculum for Excellence. The pressures of the curriculum in general could often squeeze music to the margins of what a school had to fit in to its schedules.

The range of musical styles and experiences within school music education has undoubtedly widened in recent years. Singing, the most fundamental musicality, had increased enormously, with a significant uplift of activity prompted by the need to meet the government targets of the YMI.

Scottish traditional music is also more common in school, as are rock/pop music and, to a lesser extent, jazz.

In these areas the influence and expertise of people and organisations from the informal sector (so often supported by SAC- Creative Scotland and YMI) has played an important role. The concern expressed by consultees is that there are still not enough music class teachers or instrumental instructors with sufficient knowledge and expertise in one or more generic area or style.

The single biggest area of concern is the growth in charging for instrumental instruction and the barriers to access that it creates for many young people.
6.3.1 Early years

Music activity for pre-school children (and their parents) was identified as a significant gap by the What’s Going On? report. There is evidence from YMI reports and elsewhere that many local authorities - in this case working through libraries, early years care workers and nursery schools - have since embraced the opportunity of building early years music provision.

The Bookbug Song and Rhyme project, funded by the YMI and led by the Scottish Book Trust (SBT) following their programmes in stories and literacy for early years, tells its own success story. In the past 4 years the SBT has trained 457 local authority staff to run Bookbug sessions, with the result that 12,608 Sessions now take place across Scotland every year, with a total annual audience of 331,558 (see Case Study 2 at Appendix 4).

6.3.2 Primary education

With the inception of the YMI and the government’s associated target that all children should receive one year’s free music tuition by the end of Primary 6, music activity has become more prevalent in primary schools.

Instrumental and singing tuition takes place in most authorities to fulfil the P6 target but the picture outside that age group is variable. Nevertheless, the various documentation available indicates that a plethora of valuable projects do take place each year in the primary sector across the country. And the nature of primary education means that the opportunities for cross-curriculum work are higher than in the secondary sector.

Much of the YMI-funded work has been undertaken by external specialists – individuals, or funded organisations such as NY COS and Feisan nan Gaidheal (FnG), or independent organisations such as ABC Music. Some local authorities have specifically designated Primary Music Instructors or Principal Primary Music Teachers to lead the work in a number of primary schools, but many do not. By chance or design, some primary schools have a class teacher with a special interest or skill in music who will lead projects in their own school.

The two key issues for primary education in music that emerge from our consultations are:
the inconsistency in primary music provision across the country; and

- the dearth of primary school class teachers who have the expertise or knowledge or training or perhaps just the confidence to teach and lead music projects in their school.

6.3.3 Secondary education

The levels of music provision, although still inconsistent across the country, are higher in secondary schools. There is a wide range of activity in and out of school led by a cadre of dedicated and skilled teachers.

This is the age group on which the majority of instrumental instruction has traditionally been concentrated, for which specialist class music teachers are provided, and in which Standard and Higher qualifications are attainable.

Criticisms of the quality and standard of music education during our consultation were most clearly aimed at the secondary level. There is a perception that whilst pupils are encouraged to make music they are not always equipped with an adequate standard of musical literacy or given a broad musical background.

It was suggested that the SQA Standard and Higher qualifications lacked rigour and depth and were not sufficiently challenging to either teachers or pupils.

Such observations - from a sector that cares deeply for the next generation of Scottish music - must be examined if there is to be a fully confident and productive relationship between education and the wider music world.

6.3.4 Specialist schools

Our review did not specifically cover specialist music schools, but we heard confirmation from the music sector that they are an important element in the training of some of our most talented young musicians.

Although starting from a base of classical music, all of the specialist schools (which are all state-run (with the exception of the independent St Mary's Music School which is supported by the government's Aided Places scheme) now provide a broader range of musical choices for their pupils, including jazz studies which have produced several of the new generation of jazz players.
The traditional music specialist school at Plockton, which has run for more than twelve years, was particularly praised, especially since there had been a threat of closure in the recent past.

### 6.4 Instrumental tuition

The instrumental tuition services in each of the 32 local authorities vary widely in the style and extent of their provision - but together they deliver the majority of instrumental teaching for young musicians in Scotland.

A total of over 750 instructors are managed in their local authorities by a Head of Instrumental Tuition (whose network organisation is HITS). They deliver specialist tuition on almost all instruments to school pupils - including those who are studying for SQA exams - and are also often involved in running school or authority-wide bands and orchestras, concerts, competitions, special projects, courses and workshops.

Some examples of additional music service programmes designed to enhance opportunities for pupils include:

- liaison and projects with young musicians from Ulster, Norway, England;
- partnership projects with musicians from the SCO, Scottish Opera, Drake Music, NY COS, EMS, other ensembles;
- songwriting/recording/design joint projects in the authority with visual arts and IT pupils; introductory jazz workshops with NYJOS in every secondary school in the authority;
- jazz weekends;
- CPD for teachers;
- choral groups with NYCOS; and
- composition with composers and new music ensembles

We heard that with local government reorganisation, some of the biggest youth orchestras were lost, and with them the stepping stones between purely local and national youth opportunities. However, the list of local-authority run orchestras and bands in Scotland is still very impressive (See Case Study 3 at Appendix 4 for an
example from Orkney of the wide range of groups that a single local authority can contain).

Instructors are often also professional performers and may have a speciality in a particular area of music although this is not required by the local authority. They may also have teaching qualification, also not required. There have been calls recently from the Educational Institute of Scotland (EIS) and from Creative Scotland-related groups for a system of certification and registration for music instructors (as well as similar tutors in other artforms) in the same way as class teachers must be registered with the General Teaching Council (GTC).

Free instrumental tuition had been a bedrock of Scotland’s musical excellence and of broad public interest in playing and listening to music. But over the last two decades the principle of free instrumental tuition for all has been eroded by local authority cuts to the music services. Now fewer than eight authorities still provide instruction free of charge - except for the one year provision under the YMI P6 target and funding. Charges levied by the rest vary - the average range for one child’s lessons is £150 to £200 per annum but can be as high as £350. Concessions are offered by some authorities to some children, some are given free places - there are no standard charges or exemptions on a national basis.

Pupils studying for SQA music exams could, until recently, take instrumental instruction free of charge, even if their authority charged for other lessons. Now some authorities are avoiding the cost of this provision either by levying charges or by making classroom teachers responsible for delivering all instrumental tuition - whatever the instrument - to their exam pupils. The implication for the quality and standards of tuition is obvious.

The effects of the growing trend to charge for tuition are evident to the HITS overseeing the services. Numbers of pupils are falling, after their P6 free year or as charges rise. Children from hard-up families are facing the oldest and simplest barrier to access. Parents who could find the money for their children to learn an instrument are either less inclined to start the process or, if the child is not immediately hooked or seems to lack talent, find it easier to stop.35

35 Since the completion of this review the Scottish Government have announced a review of tuition fees
6.5  Further and Higher Education

6.5.1 Colleges

There has been a recent growth in music as an option for study in further education across the UK. More than 20 colleges in Scotland currently offer music courses, focusing on practical music-making, performance, studio recording and music and sound technologies, with only limited opportunities for academic studies such as theory and history.

Although some courses may disappear as college reorganisation takes place, the student numbers are high for what are predominantly vocational courses. What is the expected percentage of students who will go on to find employment in music, and at what level? What level of demand is there from employers in the industry or, as is more likely, what is the scope for self-employment/freelance working? The general impression is that the supply far outstrips the demand.

6.5.2 Universities and the Conservatoire

Figures for the last two years show almost 2,000 students taking graduate or postgraduate degrees in music in Scotland in eight institutions, about 10% studying at the specialist Royal Conservatoire of Scotland (RCS, formerly RSAMD) (see Table 3.5 in Appendix 2). The courses offered presented a good range of opportunities (see Table 3.6 in Appendix 2). Cuts in university budgets may again see some contraction in this provision; the issue of employment opportunities set against the number of graduates was raised again by consultees.

The radical change in tuition fees in England has already created a rise in applications from Scottish students seeking a place at the RCS. In former years there would have been a greater flow of Scottish applicants to English conservatoires. The competition will be fiercer for RCS places in future and therefore those students who are rejected will face either paying huge fees if they can get a place in England or losing the opportunity to study at this high level at all.

Musical diversity has begun to show through in higher education. The RCS degree in Scottish Traditional Music has been rightly celebrated and is producing many good performers. The RCS Jazz degree is very new but has been widely welcomed. The
other universities cover a fair range of subject areas of music both practically and in academic studies; and the University of the West of Scotland (UWS) emphasis on entrepreneurship and commercial music has also produced some newly skilled industry employees.

There are good examples of collaborations and partnerships between our universities and other parts of the music sector. As well as the direct relationship with professional musicians and composers as tutors and mentors, there are projects such as the intensive and practical research programme by Glasgow and Edinburgh universities into the business of live music promotion; the creative international project with Aberdeen University and the Sound Festival and their opposite numbers in Norway and Russia; and the RCS’s outreach and knowledge transfer activities which include the high quality Junior Academy programme.

Consultees took an active interest on all sides in the institutions playing a full part in connecting all the stages and elements of music education to provide the best possible pathways for young people.

### 6.6 Teacher training and CPD

The 2011 report for SJF on Jazz Education in Scotland summarised the teacher training position in respect of jazz:

“If music graduates wish to become school teachers in state education they go on to take a post graduate certificate or diploma in education. These one year courses address issues of teaching and learning in general but, again, have little or no elements that relate specifically to teaching in jazz or improvisation.”

Consultees said this statement could be extended to apply to any specific area of music, and were concerned about the level of musical knowledge of emerging teachers.

The EIS Charter for Instrumental Music, published in 2011, was warmly welcomed. Alongside its demands for full access by all children in Scotland to the highest quality tuition, it also called for:
“GTCS Registration – registration as an instrumental music teacher. This would acknowledge the status of instrumental teachers and give parity with classroom teacher colleagues.

Continuing Professional Development – access to the highest quality CPD in order to enhance the quality of instrumental teaching throughout Scotland.”

In association with the Artworks programme which is focussed on the development of artists in education, Creative Scotland is seeking a parallel GTC registration status for artists who teach as part of their professional portfolio (as so many musicians do).

It is also worth noting the important lobbying and influencing role of the MU in this area.

CPD programmes, for teachers, instructors and musicians (as well as others in children’s services as the Bookbug examples indicates) are in evidence across Scotland and have been much stimulated by YMI and the funding available.

There is no apparent overview of what is being provided, because activities are organised or offered by a wide range of providers; by local authorities’ music services, youth music organisations such as NYOS or FnG, arts sector groups like MMS or SBBA, orchestras and ensembles, independent providers such as ABC Music, university short courses, ABRSM packages - the list goes on.

### 6.7 Informal sector

The informal sector in music education has grown exponentially in the last 30 years, from a distinct lack of recognition to a position of important contribution and significant influence.

Across all its manifestations it offers not just ‘added value’ to music education but essential value, in terms of skills and specialisms.

Traditional music could not be covered to the extent it is across the country without the contribution of dedicated organisations such as the TMSA, FnG and their local colleagues. NYJOS (the jazz element of NYOS) and other jazz organisations are the main sources which can offer and channel expertise in jazz and improvisation.
into educational situations cross the country. And ensembles such as the Hebrides and Red Note bring students and pupils an invaluable practical understanding of contemporary composition and performance. Pioneers including as the SCO (the first UK orchestra to employ an education officer), FnG (trailblazing for Gaelic music in tandem with youth tuition) and NYOS have brought in their wake a spectrum of commitment to work in education and youth music across the music sector.

The informal sector can also make direct contributions to the structures of formal education. The best example of this process is in piping. Remarkably, Scotland’s unique instrumental tradition has had only an obscure place in formal education in the past. Now, as well as providing piping opportunities in and out of formal schooling, the commitment of piping organisations has led to the formation of the Piping and Drumming Qualifications Board which has brought to bear their collective influence, seeking and gaining SQA accreditation for their tuition work.

6.7.1 Youth music organisations

Local youth music organisations

Most school and area bands, orchestras and projects across Scotland are attached to the formal, local authority supported sector. However there are also a growing number independent of local authority funding. Independent projects established by enthusiastic volunteers have benefited from a growth in available youth and arts education funding sources - particularly as Lottery funding opened to project work in the late 1990s and the YMI began in the early 2000s.

Some of these youth organisations were established for a specific music, for example:

- The Dumfries Youth Jazz organisation which now caters year-round for around 120 young musicians of various ages and all abilities

- The Orkney Traditional Music Project (which now admits some adults but is focussed on young people), which was an early recipient of Lottery funding to assist its start-up. (see Case Study 4 in Appendix 4)

Other youth music projects may be set within organisations with a wider remit:
The Foyer music project in Aberdeen is part of a youth centre alleviating youth homelessness and unemployment through positive activities. The music provision includes regular promotions, rehearsal rooms, instruments and equipment, DJ-ing facilities and a 24 track recording studio; and

Dumfries’ Oasis Youth Centre offers facilities for young musicians along similar lines, as well as running workshops and projects in music and other artforms.

Created from a determinedly social perspective, Sistema Scotland has established its unique offer of orchestral experience for young people from difficult circumstances in Raploch (the Big Noise Centre) with the aim of transforming their lives. Funded from public and private sources this long-term project has been evaluated independently and shown to be of great social benefit (as well as musical and potentially economic). The organisation is now advocating for support in other geographic areas, on a basis of long-term community advantage, and will open a second centre in 2013.

National youth music organisations

Drawing young people from all over Scotland, this diverse group of organisations represents the highest standards of youth performance. Membership is usually by annual audition open to Scottish residents, and activity is mainly based around holiday or residential courses with associated performances. All have partnerships with other performing and educational organisations. They comprise:

- **National Youth Brass Band of Scotland** (NYBBS); now run as part of the SBBA. Not publicly funded, but the appointment of an SBBA development manager through YMI funding has led to a youth band programme which has seen the number of local youth brass bands in Scotland rise from 6 in 2006 to over 60;

- **National Youth Orchestra of Scotland** (NYOS); run by the NYOS organisation which also also embraces a Senior and Junior orchestra, a Camerata of past and present members, a string orchestra and NYOS Futures (contemporary chamber music). Financed through members
subscriptions and fundraising, and public funding from Creative Scotland (as an FX but on project funding in 2012/13)³⁸;

- **National Youth Jazz Orchestra of Scotland** (NYJOS); also run by NYOS along with a younger jazz Access group and a senior jazz Collective. NYOS and NYJOS also run broader development activities across the country, some funded by YMI;

- **National Youth Choir of Scotland** (NYCOS); comprising The National Youth Choir of Scotland, the NYCOS Chamber Choir, the NYCOS Training Choir, the NYCOS National Boys Choir, and the NYCOS National Girls Choir. NYCOS runs many youth music projects and CPD training programmes. Across the country it has established 15 Area Choirs and the Mini Music Makers early years programme. Currently funded by Creative Scotland as an FO;

- **National Youth Pipe Band** (NYPB); launched in 2002 by the National Piping Centre supported by a Lottery award. A second Development band has been established. Runs a substantial programme of development and outreach work that takes in schools, local authorities, piping societies and other pipe bands. Annual project funding from Creative Scotland via the YMI; and

- **Feisan nan Gaidheal**; (FnG) the national development agency for Gaelic music amongst young people, representing 44 autonomous local feisean. FnG has devolved authority from Creative Scotland to disperse the funds for music tuition to the individual feisean, and other pooled funding to support rapidly expanding young people’s performance programmes. Core funded as an FO by Creative Scotland, and by HIE, Bord na Gaidhlig and Highland Council, much development and in schools work is funded via YMI funds granted to local authorities. The largest of the individual feisean, Feis Rois, has been particularly successful not least through the popular Ceilidh Trails project.

All these organisations undertake extensive development work - and generally on a national basis. This role could be more formally recognised and enfranchised by funders. In particular The NYJOS/jazz element of NYOS was identified in the 2011

³⁸ As this review was completed, Creative Scotland were due to receive a review of NYOS and its future plans.
SJF review as the natural host for jazz development work on a national basis - and as the hub of a network of regional jazz education organisations.

FnG and NYCO are FOs, while at present the other national youth music companies are required to apply for annual project funding. Notwithstanding the different organisational bases on which they operate they can only operate as long-term flagships and development organisations with some assurance of core funding. Five professional National Performing Companies are all permanently funded by the Scottish Government in recognition of their flagship status. Whilst not proposing that the national youth companies should be moved away from the aegis of Creative Scotland, we suggest it is reasonable that they should be seen in the same light as permanent national institutions.

Local and national youth organisations liaise with one another informally - but not in all cases. There is no overview of the pattern they create - nor a meeting place for them all (although there is a degree of virtual contact through the Youth Music Forums). Without creating more work or administrative structures, a more consistent mechanism for networking and liaison would be beneficial.

Anticipating a common question, we have not heard, nor can we find, any case for merging any of the national youth organisations. They are all driven by people knowledgeable in and committed to the area of music concerned and this is a valuable strength. They also all now productively operate on several fronts.

The National Youth Orchestra of Great Britain holds first round auditions in Scotland and regularly selects a small number of talented Scottish players; seven Scottish members in 2013.

See Appendix 5 for more detail on the national youth music organisations.

6.8 Lifelong learning organisations

There are many organisations - private companies or not-for-profit and community organisations - providing opportunities for people of all ages to play and learn.

The opportunities are also pitched at many different levels of ability - from the open house of Edinburgh’s year-round Adult Learning Project Scots Music Group to the
hothouse for young chamber music professionals at the annual Mendelssohn on Mull festival. The examples (and these are just a very small sample) stretch across the board geographically and in terms of musical preference: Feis Rois, the most extensive of the individual feisean runs the annual Feis Rois Inbhich for adults; GRCH presents a jazz summer school for all-comers at the time of the GIJF; Jazz Course UK runs regular weekend courses in Lanark; and MMS is regularly publicising training events for singing, chamber and orchestral music such as the Variations annual gathering of amateur chamber musicians in Ullapool.

6.9 The contribution of the music sector

There is a clear reason here to celebrate. People and organisations in every area of the music sector, whatever their core purpose, have embraced education (in a broad and inclusive definition) as a natural part of their remit. There are few festivals, arts centres, promoters or performing companies that do not run education programmes - courses, classes, workshops or masterclasses, the patterns of provision vary. Our observation is that the majority of the activity is focussed on young people, but work across communities and age ranges is also very much in evidence. The music sector is now a full part of the informal education sector.

Taking just two notable examples amongst many (see Case Studies 5 and 6 in Appendix 4 for more detail):

- Celtic Connections runs children’s workshops, concerts and tutorials to nurture an awareness of traditional Scottish music, and since 1999 has reached over 170,000 children from all over Scotland (including pupils from over 70% of schools in Glasgow); and

- SCO is a field leader in education work. Connect - its outreach and education department - lists a programme from early years to life-long learning so extensive that even the appendix entry is a summary of its full range.

The annual Government report on the national companies enumerates their education work: in 2010/11 the SCO presented 223 separate education sessions, involving 9,929 people; the RSNO ran 174 education events with 21,631 participants. Scottish Opera presented five new education projects around Scotland resulting in participation by 38,000 children, young people and adults. The Scottish Government’s direct funding for the National Companies assumes that they will all
undertake education work as a core activity, although this involves raising additional funds. Education is assessed for the government by external experts.

Project funding or cost-recovery through fees (or a mix of both) are the main resources that support most education projects undertaken by other performing and promoting organisations. Some receive local authority support and others may be contracted as service providers. Music organisations are often putting money into education provision, through the trust or sponsorship or other public funding they are constantly raising for projects and through the expenditure of their own core resources. They also contribute much in the way of support in kind.

The valuable and unique contributions of this large swathe of organisations are over-dependent on short-term or vulnerable sources of financial support. Yet education projects provide considerable work opportunities for musicians and music organisers. In the feisean movement alone, the annual value of employment was over £2 million (see Case Study 7 in Appendix 4).

6.10 Youth Music Initiative

Introduction

In the consultation our interviewees expressed a great deal of praise and appreciation for the YMI and the positive influence that it has brought to the development of youth music in Scotland. From what had been at best a marginal involvement in youth music, with the inception of the YMI the SAC (and now Creative Scotland) moved swiftly into a central position.

YMI was established in 2003 through a partnership between the National Foundation for Youth Music, the Scottish Arts Council and the Musicians’ Union in response to the ‘What’s Going On’ report, a national audit of youth music in Scotland. The then-Scottish Executive allocated funding to SAC to strategically address the key findings and to achieve the government’s target that by 2006, all schoolchildren should have had access to one year’s free music tuition by the time they reach Primary 6.

The Scottish Executive allocated an initial £17.5m over the period 2003-2006, with funding then reaching £10m per annum thereafter. The total invested to date, (via SAC and now Creative Scotland), has now reached £87.5m, and recent budget announcements by the Scottish Government have confirmed continuing funding of...
£10m, per annum to 2013/14. The P6 target, judged by government to have been met after 2006, is being sustained.

In 2006 a sector-wide consultation resulted in the publication by SAC of Scotland’s first National Youth Music Strategy. Endorsed by the Scottish Executive, it contained an action plan for SAC’s delivery of the YMI. The four broad strategic aims - Widening, Sustaining, Organising and Promoting participation - embraced the findings of What’s Going On.

From the outset, YMI funding has been split between an 80% allocation to the formal sector via Scotland’s 32 local authorities and Jordanhill School and 20% for awards to the informal sector.

Funding to local authorities is distributed based on a formula which takes into account the number of pupils and is adjusted for geographical location through the rural weighting mechanism.

Local authorities apply annually for their funding allocation, initially with the aim of meeting their P6 target and also, guided by YMI, looking towards specific priorities that reflect findings identified in What’s Going On and subsequent publications.

**Informal sector YMI funds**

The YMI has established a range of funding strands and criteria also in direct response to What’s Going On and subsequently to the ongoing monitoring of projects it has supported.

It has also responded to the need for young people to determine their own direction by piloting programmes to support young people making music independently, in such areas as making demos, creating tours and performing networks, rehearsal and mentoring opportunities.

In the 2012/13 YMI has simplified the funding streams - for both open applications and managed funds - to three:

- **School Based Music Making** (local authority formula funds);
- **Access To Music Making** (all projects and learning activities); and
• **Strengthening Youth Music** (strategic and organisational developments).

There is also a Training and CPD fund devolved for administration to SMC.

**Youth Music Forums**

To connect the various youth music interests and providers - formal and informal - within each local area, YMI established a fund in 2006 to encourage the formation of Youth Music Forums. By 2009, 17 had been created, most with websites carrying information and opportunities for networking and communication.

Membership of the forums differs between areas - in some, members are youth music providers; in others they include young musicians or the general music sector; some have recruited local interested non-music or social agencies. Most meet regularly; some (like Dundee) have part-time co-ordinators. Co-ordinators are mainly employees within the local authority education or arts structure but also include organisations such as the Tolbooth, Stirling, GRCH and Shetland Arts.

Several YMFs have undertaken mapping of music and youth provision in the local area. Projects have included local showcase events, making CDs and DVDs and the development of direct planning input by young people from the area.

The two key issues in their development would appear to be the need to galvanise and fully engage the whole range of formal sector interests, and the need for a national forum to provide a hub connecting activists across the country.

**YMI achievements**

The most significant review of YMI's work, 'Retuning', was commissioned from the Centre for Public Policy, University of Northumbria in 2007. Its conclusion was an unequivocal endorsement (which still holds as good in our current brief appraisal):

*The evaluation concludes that the YMI has had an enormous impact on the range of music making opportunities for young people across Scotland. There is overwhelming enthusiasm for the benefits of YMI funded work, spanning a range of social and educational areas. Teachers, parents, music instructors, young people and other stakeholders have all highlighted important outcomes that are occurring as a result of participation in YMI funded work. These positive findings are tempered by*
widespread concern over the sustainability and future of the initiative, which remains dependent on significant ongoing financial investment. In view of this, the evaluation supports the continuation of the YMI through the further investment of funds.\textsuperscript{41}

While the results of the YMI’s work over ten years with young people are its most important measure of achievement, statistics produced along the way give a sense of its scope and scale:

- each year the YMI currently supports well in excess of 300 projects covering all musical genres, age groups and teaching methods;
- by the end of the academic year 2010/11 there were at least 1.7 million \(1,736,372\) attendances at YMI funded programmes across all of Scotland’s 32 local authority areas;
- in the fifth year of the programme a total of 194.94 FTE staff - 586 individuals - were employed by local authorities through YMI funding\textsuperscript{42};
- by 2011 there had been 280 successful applications to the YMI small & large grant fund. £3.9million has been awarded with the total requests for funding reaching £9.77million; and
- a further £2.48 million in partnership funding was levered by the projects of the applications above, of which, £1.55 million was in cash contributions.

And as examples of what the project funding has generated:

- 598,086 participants attended the Bookbug Rhymetimes programme between 2006 and 2011;
- YMI support for SBBA development increased the number of youth brass bands from 6 to 63; and
- The SJF research supported by YMI identified 65 youth jazz ensembles across the country and created new strategic approaches to jazz education.

A case study of work in the Scottish Borders (Case Study 8 in Appendix 4) gives an example of how YMI has had an enormous impact in local authorities. A descriptive

\textsuperscript{41} Retuning: Evaluation of Scotland’s Youth Music Initiative 2003-2006 - Scottish Arts Council
\textsuperscript{42} P6 Target annual monitoring report (Scottish Arts Council 2010) http://www.scottisharts.org.uk/1/information/publications/1007367.aspx
summary of the extent of YMI achievements is also outlined as Case Study 9 in Appendix 2.

**Issues facing YMI**

Some local authorities, under increasingly severe financial pressure, are (or may be) inclined to use their YMI formula funding to cover widening gaps in their standard provision rather than to build and develop the offer for their pupils.

The YMI has only a limited influence over local authorities' spending and has no sanctions that it could apply if formula funding was not used particularly well or did not address relevant targets.

On the other hand, local authorities using their formula funding and other resources to very good effect are to some extent restricted in the use of YMI funds for wider development purposes or in accessing additional funds to extend their work.

YMI's strength is that it covers both the formal and informal sectors but are there issues of flexibility in the allocation of funding and the 80/20 split and set formula for local authorities could be examined.

Consultees welcome the fact that Creative Scotland and the Scottish Government are working on a Youth Arts Strategy. YMI and the National Youth Music Strategy have helped to pave the way for this wider approach to all youth arts and YMI will undoubtedly play an important part in its creation. But some expressed a cautionary anxiety. In creating an overall strategy for youth arts (including perhaps a national youth arts centre) it is hoped that YMI and youth music in general will not be unduly deflected or absorbed in a broader youth movement. Music has its own ecology and needs.

That sentiment, of course, also applies to the Government's funds for YMI. We should resist any idea that somehow Youth music has been ‘done’ and can now be left alone while other work is addressed. Youth music is an ongoing project which demands ongoing attention.
Ten years of support and stable funding for YMI is a huge credit to the Scottish Government. To capitalise on indisputable achievements and to sustain development, Creative Scotland must ensure that the YMI’s fundamental need is understood to be for permanent, long-term support.

6.11 So - What’s going to be going on?

The landmark of ten years of the YMI coincides ideally with this review and Creative Scotland’s intention to plan for the long-term. The YMI is poised for a review of the current youth music scene and follow-on plans for the next ten years.

We suggest that the work of What’s Going On should be revised and updated - to provide an accurate map of the current state of play for youth music in Scotland and a revised indication of needs and priorities. Documentation accumulated over the past ten years will be of assistance to this process.

Informed by this new What’s Going On, the YMI will be in a position to take the lead on drawing together a national forum of those involved in youth music provision and formulating a new and comprehensive version of a National Youth Music Strategy.

The YMI should remain a key mechanism in a national strategy. Importantly, it must not be used as a substitute for core classroom activities, but rather as a means of adding greater value above and beyond core provision. In setting out future direction for a national strategy and for the effective operation of the YMI within it, it will be necessary to address the following areas:

- instrumental (and singing) tuition charges and availability;
- a consistent level of provision nationwide;
- sustainability;
- revisiting the P6 target;
- revisiting the 20/80 split between informal and formal sector funding;
- criteria and flexibility for LAs in formula funding;
- the position of the national youth companies;
- a regular national forum;
- close relationships between local authorities, HE/FE, the SQA, government and the informal sector;
- dovetailing YMI with the Youth Arts Strategy;
- collation and use of research and documentation; and
- the role of the YMI team in strategic development work.
7. People in Music

7.1 Introduction

Thus far we have touched on some of the issues that affect people in the music sector – the freelance nature of work, the pressure to earn a living and the role and importance of education in developing talent. In this section, we explore in more detail the employment patterns in the sector, the role that individuals play in the music sector – musicians obviously, but also songwriters and composers, producers, managers, agents and volunteers – and reflect on some of the areas of need and opportunity for Scotland.

7.2 Employment in music

As noted in Chapter 2, the creative and cultural sector in Scotland employs 57,870 people, of which 10,790 (19%) are involved in music. Music is the second largest employment sector in the creative and cultural industries after design (28%).

Figure 7.1 provides a breakdown of Scotland’s employment in the music sub-sector by age and compares this with the creative and cultural sector as a whole.

Figure 7.1: Employment in music sub-sector by age (Scotland), 2010/11

Source: Creative Choices, Scotland: Impact and Footprint 2010/11; N = 10,790 (music) and N = 57,870 (creative and cultural)
We know that freelance employment is a characteristic of the creative industries, and the breakdown between employees and freelancers in music is in line with that for the creative and cultural sector in Scotland as a whole, as shown in Figure 7.2.

Figure 7.2: Workforce (Scotland), 2010/11

<table>
<thead>
<tr>
<th></th>
<th>Employees</th>
<th>% of all workforce</th>
<th>Freelancers</th>
<th>% of all workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td>6,900</td>
<td>64%</td>
<td>3,890</td>
<td>36%</td>
</tr>
<tr>
<td>All creative and cultural sector</td>
<td>36,380</td>
<td>63%</td>
<td>21,490</td>
<td>37%</td>
</tr>
</tbody>
</table>

Source: Creative Choices, Scotland: Impact and Footprint 2010/11

Scotland’s music employees are, in the main, working on a full-time basis (7,310, 68%). Music has a higher level of part-time employees than the creative sector as a whole (32% compared with 24%).

Surprisingly, a very small proportion of the workforce in the Scottish music sub-sector has a second job (0.5%, 50), although this may be due to data collection issues (for example, those working as music teachers may report their main occupation as education rather than music). For example, in our survey, more than a third reported that music was not their primary source of income (21 responses, 36%). 12% reported no income at all from music.

Indeed, average earnings in music are low. The average wage per hour in the creative and cultural sector is £8.63; within music this is lower at £7.36 per hour (the second lowest of the sub-sectors)43. This is consistent with the findings of our own survey in which 80% reported earning less than £20k.
However, this is unevenly distributed. Figures analysed by PRS for Music suggest that songwriters and music publishers based in Scotland derive 40% of their royalties from international sources, a greater proportion than for the UK as a whole.\(^{44}\)

**Implications**

There are a number of points to make from this brief summary:

- first of all, music is an important source of employment in Scotland, accounting for more than 10,000 jobs (of which almost 4,000 are freelancers). This exceeds most of the other sectors in the creative industries;
- employment patterns are quite fragmented, with freelance and part time working widespread. We also know that many within the music sector wear many hats simultaneously – for example, musicians that run a label, publisher and promote live music; and
- while there is no doubt that many in Scotland’s music sector are doing well, the average income level is low, driving some toward second jobs and alternative sources of income.

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\(^{44}\) Scotland’s music festivals show rapid growth, BBC News, March 2012 (data from PRS for Music).
7.3 Volunteers

The analysis above covers the professional music sector. There is also a huge and critically important role played by volunteers. As noted in Chapter 4, amateur music making is huge in Scotland, but this does not take account of the often under-recognised role of volunteers in supporting the professional and semi-professional sector.

Recent research by Voluntary Arts Scotland found that over 2 million people – 50% of the adult population - regularly take part in arts and crafts activities in Scotland. 263,400 volunteers are estimated to help organise participation opportunities contributing, at least, 7,620,000 volunteer hours per year. 47% of respondents to a recent National Voluntary Arts Survey identified themselves as having an involvement in music. This indicates very clearly the scale of voluntary input to music activity, and is further evidence of the centrality of music in the lives of people in Scotland.

For many, amateur music groups are the first point of entry into the sector, and community run music events and activities often reach parts of the population that do not typically attend more mainstream provision. Indeed, as examples like the Big Noise Orchestra project in Raploch clearly demonstrate, music changes lives and can have transformative effects on individuals and communities alike.

Amateur and voluntary music also make an important contribution to audience development, and were consistently highlighted as significant but often overlooked parts of the wider ecology of music in Scotland.

Many music organisations are run by volunteers, and venues and promoters often make extensive use of volunteers to support their activities. In particular, many of Scotland’s smaller festivals are run by volunteers, and even larger events depend on volunteers as staff. Also, as noted in Chapter 4, volunteer promoters play a crucial role right across the live sector.

However, life in the voluntary sector is precarious. Funding is a persistent challenge, and voluntary groups are typically operating on shoestring budgets with very limited scope for forward planning. Indeed, fundraising was identified as the single most
important issue for the voluntary arts sector in the recent National Voluntary Arts Survey.

The survey also found strong demand for skills development support, both artistic and practical, particularly in areas like marketing, PR and legislation.

There is also a flip side to the large scale involvement of volunteers in the sector, in that they can be perceived as somehow devaluing the role of the professional. This is a delicate issue, but one that must be acknowledged. In small creative economies, this can be a source of real tension, particularly if agencies are seen to promote the use of volunteers at the expense of creating opportunities for paid work.

Nevertheless, it is clear that the voluntary sector makes a very real and substantial contribution to the success of music in Scotland at virtually all levels and across all genres of music. It is important that this contribution is both recognised and supported as an essential part of the vibrancy of Scotland’s music community.

7.4 Talent

We have already commented on the wealth of musical talent in Scotland. Indeed, Scotland has never struggled in this respect, but the rise of formal and informal music education over the last twenty years has also had an impact. The feisean movement, for example, has greatly strengthened the throughput of talent in traditional music, and the Youth Music Initiative, youth jazz orchestras, brass bands and more specific projects such as Sistema Scotland have provided young people with a varied range of high quality opportunities to experience music and music making.

It is important to remember that without songwriters and composers, there is no music sector, and this is an area in which Scotland has long excelled. From James MacMillan to Emelí Sandé and Bill Wells, Scotland has always produced successful composers and songwriters of exceptional quality. Indeed, feedback from PRS confirms that Scotland’s composers continue to punch above their weight within the UK industry whether composing for other media or for musical performance45.

At the performing end, Scotland’s musicians continue to enjoy international success across all genres. Orchestral provision in Scotland is in a period of real creative
excellence, and jazz, although still small, has never been stronger, at least in musical terms. Traditional musicians like Phil Cunningham are in demand across the world and high profile artists such as Lau, KT Tunstall, Amy McDonald, Biffy Clyro and Mylo continue to ensure that Scotland has a strong presence in international rock and pop.

This track record is, however, no cause for complacency. As discussed in Chapter 6, the position of music in education is a cause for concern, and without support for the next generation of musical talent, Scotland risks losing this strong position.

Many musicians are also struggling to make a living in Scotland. More than one-third of the individuals that responded to our survey reported that music related activity was not their primary source of income (36%). The most common primary sources of non-music related income were from other paid employment (e.g. consultancy, PR, in third sector, marketing, etc), or from investments and pensions. Two thirds of these respondents (67%) went on to indicate that there were involved in amateur/voluntary music activity.

Where individuals indicated that music was their primary source of income and for those that reported that they were involved in amateur/voluntary music activity (i.e. 51 individuals), respondents were asked to provide a breakdown of how their income was made up (e.g. grant income, performance fees, etc). Forty-seven individuals provided such a breakdown, as presented in Figure 7.4. Income arising from performance fees and education/teaching work were the most commonly reported sources (both 72%).
Figure 7.4: Individuals’ sources of income

<table>
<thead>
<tr>
<th>Source</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance fees</td>
<td>34</td>
<td>72%</td>
</tr>
<tr>
<td>Education/teaching work</td>
<td>34</td>
<td>72%</td>
</tr>
<tr>
<td>Commissions</td>
<td>16</td>
<td>34%</td>
</tr>
<tr>
<td>Royalties (CD/digital sales)</td>
<td>15</td>
<td>32%</td>
</tr>
<tr>
<td>Grant income</td>
<td>12</td>
<td>26%</td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
<td>23%</td>
</tr>
<tr>
<td>Royalties from publishing/ synchronisation (e.g. music for film, TV, games etc)</td>
<td>10</td>
<td>21%</td>
</tr>
<tr>
<td>Recording session work fees</td>
<td>10</td>
<td>21%</td>
</tr>
<tr>
<td>Fees for your own recordings (including advances)</td>
<td>5</td>
<td>11%</td>
</tr>
</tbody>
</table>

N=47  Note: this table is reproduced in Appendix 3 as Table 4.6

The importance of education and teaching work to the music economy is very clear. However, many of the individuals that completed our survey also reported working across other areas of the arts and creative industries.

Just under two-thirds (63%) reported that they were also involved in other sub-sectors of the wider arts and cultural industries sector (in addition to music). For these individuals, the most common areas were theatre (66%) and visual arts (45%), Figure 7.5.

Figure 7.5: Cross-sector working

N=38, multiple responses allowed  Note: this table is reproduced in Appendix 3 as Table 4.7
This level of cross-sector working should not be surprising. Indeed, the recently completed Theatre Sector Review for Scotland identified close links between theatre and music, particularly with theatre’s role as a commissioner of new music. This is healthy and should be encouraged for both creative and economic reasons.

7.5 Key Individuals

Music, like any sector, needs key individuals to champion its value and be strong role models for others in the sector. It is not the purpose of this review to single out people for specific mention, but a number of such individuals have become strong advocates and champions of the sector whether promoters, musicians, composers or educators. This is important.

However, our consultations identified a limited range of talented people in a number of key roles within the music sector:

- agents;
- managers; and
- creative producers.

We have already discussed the first two in Chapter 4, and the limited pool of agents and managers is largely a reflection both of the overall scale of the sector and the earning potential that it offers.

The last of these issues is perhaps more interesting. A number of people identified the critical role that is played by creative producers – people that can develop and deliver large scale events and special projects that bring music to a wider audience. The larger promoters do this of course, but often within a relatively mainstream offering to meet commercial demands. What is more lacking is a cadre of producers operating in the space between the commercial and ‘cultural’ sectors that can bring a more diverse programme to audiences through extended and ambitious projects, events and festivals.

Celtic Connections is a very good example of this in practice. The festival has grown over the years to become a truly diverse and international event that brings a rich and varied programme of music and special projects to audiences in Scotland that would they otherwise not experience. At one level, the success of Celtic Connections is due to the commitment of long term funders, but it is also dependent on a strong
creative vision and an entrepreneurial spirit, even if operating to an extent within a subsidised sphere.

While more mainstream events do work hard to maintain a focus on new music and, to some extent, diversity, Celtic Connections is quite a different proposition, and Scotland needs more creative producers that can pull together extended projects of the kind that it and some other imaginations in Scotland have demonstrated can successfully be created.

7.6 Wider skills issues

In common with the wider creative industries, music is generally a well qualified sector. Figure 7.6 provides an overview of qualifications among the workforce in both music and the wider creative and cultural sector in Scotland.

Figure 7.6: Qualifications (Scotland), 2010/11

The music sub-sector has a higher level of employees with no qualifications compared with the wider creative and cultural sector (10% compared to 5%). The music sub-sector also has fewer workers with at least a level 4 NQF qualification (52% compared to 61% for the wider sector).

We have already commented on the need for business skills within the music industry (Chapter 4), but previous research suggests significant barriers for music organisations in relation to accessing the skills necessary to thrive. For example,
research by Creative and Cultural Skills (CC Skills)\(^46\) found that more than half of UK music organisations reported that their employees receive no training and development at all, with lack of funds being the most frequently identified barrier.

Perhaps more worryingly, the same study reports that music businesses tend not to ‘think forward’ about their future skills needs and yet 30% of music organisations report skills gaps\(^47\), a figure that rises to 74% in the commercial music industry\(^48\).

This is despite the fact that the sector is generally educated to a high level, and there is a widely reported over supply of applicants to the sector in general, although the live sector has a shortage of skilled technical workers. In fact, this over supply means that employers are able to take their pick from a selection of highly qualified applicants, often those with the resources to work for low wages (or unpaid) to gain entry to the sector. This has the effect of limiting the diversity of the workforce, an issue common to many of the creative industries.

Music is a fast changing industry, not least as a result of digitisation, and the skills of those in the sector must keep pace with these changes. CC Skills is the appropriate organisation to address these issues in partnership with others, potentially including Creative Scotland. The main priorities are:

- to encourage more collaboration between the music industry and higher and further education to inform course development and delivery and improve opportunities for real world experience for students;
- to improve careers information and advice and facilitate routes into the sector through, for example, Apprenticeships;
- to encourage the development and uptake of CPD and training in areas in which there are known skills issues - such as IT, marketing, pricing and international promotion – and facilitate connections for music organisations and freelance workers to appropriate sources of business advice and support;
- to improve leadership and management skills and knowledge and expertise relating to copyright and intellectual property; and

\(^{46}\) The Music Blueprint, Creative and Cultural Skills, 2011
\(^{47}\) ibid
\(^{48}\) UK Music Skills Audit, Creative and Cultural Skills, 2010.
- to support the more specific skills needs of the many musicians working with children and young people.

In relation to leadership and management, Creative Scotland’s relationship with the Clore Leadership Programme is positive and could have a greater strategic impact on the music sector in Scotland.

7.7 Knowledge and expertise in support agencies

Although less an issue about the music sector *per se*, but more one that affects it, the knowledge and expertise of those in key roles within the agencies that support music is a critical factor as well. At present in Scotland, many of the key agencies with an interest and involvement in music have staff with a good knowledge and understanding of the sector. Indeed, some have truly exceptional levels of expertise. As we have also seen, there are public agencies that do not have sufficient understanding of music and therefore there is a constant need for authoritative expertise to guide them.

There was some concern within the sector about the longevity or sustainability of the expertise that does currently exist. Is there a next generation of experts coming through? Will current structures accommodate a level of expertise that is as extensive as at present? This point ties in with concern about the level of influence that those with expertise in music enjoy within their own organisations.

The authority and influence that personnel are known to have within their organisations is a significant factor in the authority and influence they can bring into play in dealing with other organisations and with the sector overall.

If the significance and the level of influence that those with music expertise have within their organisations diminishes - if the music ‘voice’ is not heard ‘at the top table’ - then the level of experience and aspiration amongst candidates to succeed the current experts will also diminish and the sector will be less well served.

Finally, and this is an issue that relates specifically to Creative Scotland, there was some concern about the extent to which music expertise was being diverted towards other parts of the cultural sector. This may be partly a communications issue. Some in the sector had picked up on messages about Creative Scotland working in a more cross-sector fashion and taken this to mean that the deep sector expertise within the organisation would be dissipated in areas not related to that expertise.
Like all of the arts and creative industries, music is a sector that is sensitive to these kinds of issues, and credibility is crucial. It is important that Creative Scotland (and indeed all other agencies engaging with music) continue to demonstrate clearly to the music sector that it understands, and is closely involved with, the sector. Creative Scotland has a unique position in music in Scotland and it is essential that it maintains the confidence of the sector in order to exert its influence beneficially and effectively.
8. Networks and Agencies

There is a large and complex network of umbrella organisations and agencies concerned with music in the UK and some dealing specifically with music in Scotland.

While an assessment of all of these groups is far beyond the scope of this review, it is necessary to note the role and contribution of these organisations to the overall music ecology and look more specifically at those directly concerned with Scotland.

8.1 Collecting Societies

Revenue in music is largely connected with copyright and royalties. Given the complexity of administering royalty payments to copyright owners and artists, the UK (as many other countries) has a number of collecting societies that collect rights on behalf of their members and distribute payment accordingly. Key organisations are:

- **Performing Rights Society (PRS)** collects royalties on behalf of composers, songwriters, authors and publishers - from music users in the UK who publicly perform and broadcast their music. PRS also collects royalties from around the world through reciprocal agreements with collecting societies overseas;

- **Mechanical Copyright Protection Society (MCPS)** represents composers, songwriters and music publishers, and negotiates licence fee agreements with those who wish to record and distribute product containing copyright musical works;

- **Phonographic Performance Limited (PPL)** is the UK collecting society for record companies and performers, licensing broadcasters who use sound recordings and also licensing clubs, pubs, restaurants, shops etc who play sound recordings in public; and

- **Video Performance Limited (VPL)** administers the broadcast, public performance and dubbing rights in music videos and represents the copyright owners of music (mainly, but not exclusively, record companies).
MCPS and PRS are now both part of PRS for Music, and both are represented in Scotland. Neither PPL nor VPL currently has Scottish representation, although PPL is in the process of putting in place a Scottish officer.

The collecting societies play a central role in the music economy, and are a major source of income for musicians and music businesses. PRS has also set up a Foundation trust fund - PRSF - which awards grants to musicians and music projects of all kinds in the UK.

Despite membership in Scotland being strong, not all musicians or music companies are members of the appropriate collecting societies. Creative Scotland has a close working relationship with PRS for Music and our simple suggestion is that appropriate music organisations should regularly encourage all concerned to take up membership of these societies and therefore maximise their available income.

8.2 Sector bodies and associations

The music sector has a range of bodies and associations that represent specific areas of operation in music - typically UK-wide organisations, although Scottish-based members often play a high profile role (e.g. on boards and committees). The only one of the organisations listed below that has a Scottish representative is the Musicians’ Union.

The primary role of these organisations is often lobbying on behalf of members on issues that affect that part of the sector. Some also provide additional services (e.g. legal services) on behalf of members. These organisations, which are primarily concerned with music industry issues, include, inter alia:

- Concert Promoters Association (CPA);
- British Association of Concert Halls (BACH)
- British Arts Festivals Association (BAFA)
- Musicians’ Union (MU);
- Music Managers Forum (MMF);
- Music Publishers Association (MPA);
- British Association of Songwriters, Composers and Authors (BASCA);
- Music Producers Guild (MPG);
British Phonographic Institute (BPI);
Association of British Orchestras (ABO);
Association of Independent Music (AIM); and
UK Music.

The only one of these bodies with aspirations to speak for the whole industry is UK Music, which is an umbrella body representing the collective interests of the UK’s commercial music industry but not necessarily the rest of the sector.

Scottish organisations and individuals are members and contributors to most of these bodies. The value of those memberships can only be judged by the members themselves - but it seems appropriate to encourage Scottish organisations to play their full part in such UK-wide organisations.

The same is most certainly true for membership of international networks and forums in which Scottish organisations can play their part but also benefit from a wider perspective and practical contacts with colleagues overseas. Scottish-based organisations, including Creative Scotland, are members of such networks as the International Society of Performing Arts (ISPA), the European Music Council (EMC), the International Association of Music Information Centres (IAMIC), Europe Jazz Network (EJN) and the European and International Music Councils (EMC and IMC).

Network memberships of these kinds (UK and international) involve the expenditure of time and, almost certainly, money in subscription fees, travel expenses etc. These memberships may often be early victims of financial cuts when budgets are under strain. Our suggestion is that Creative Scotland and other funders - and the organisations themselves - maintain as much outward-going networking as possible in order to keep Scottish music connected and in the vanguard of the music world.

Scotland’s music sector organisations

Within Scotland, there are existing umbrella bodies and associations which have been created for a specific genre or style of music-making and a few which serve broader interests which are not defined by genre. The latter category comprises:

- **Scottish Music Centre (SMC)** - a central national information, advisory and resources centre - on premises that are open to the public - which collects and disseminates information and also carries archive material on
Scottish music of all kinds, promotes and provides the use of Scottish music (and acts as publisher for some - a service that is highly regarded by several composers) and provides advice or practical services for those involved in music across the board. SMC also directly organises workshops and seminars and some more localised educational projects. It administers some of the YMI funds for CPD and skills development and for young people’s independent music making projects and also takes a part in guiding the annual Showcase Scotland at Celtic Connections;

- the **Scottish Music Industry Association (SMIA)** seeks to represent the interests of the commercial music industry in Scotland (i.e. similar to UK Music) and aims for a cross-genre approach but thus far it has appealed mainly to the rock and pop industry (although it is building links to other parts of the sector, notably jazz and to some extent traditional music). SMIA has a strong focus on labels. It organises some training and networking events and is the main organiser of the Scottish showcase/delegation at the annual South by Southwest in the USA. A recent project is the Scottish Album of the Year awards which has attracted positive attention. Creative Scotland has seconded a member of staff to the SMIA to provide support as it develops and consolidates its role;

- **Highlands and Island Labels (HAIL)** began life in 2000 as a trade group representing the record labels in the area, but has now grown to work with the breadth and depth of the local music industry, with projects and services for working artists, record labels, promoters and distributors and those involved in training and developing new talent; and

- **Making Music Scotland (MMS)** is a sub-set of the UK organisation with Scottish representation. It represents a membership of amateur music making organisations in various genres and forms, although is centred on choral and orchestral music and contingent areas of music. MMS runs networking and training events and seminars, provides comprehensive advisory services and undertakes its own direct projects in such areas as training and awards, as well as lobbying on behalf of its members and of music interests in general.
Genre representation

The range of organisations that represent specific genres or styles of music includes, *inter alia*:

- **Scottish Jazz Federation (SJF)** works to support the development of opportunities in all areas of jazz - for musicians, bands, promoters, festivals, educators, audiences - with a series of research projects, profile raising annual awards, information services, lobbying (as a voice for jazz in Scotland) and representation of the Scottish scene in the UK and in international forums such as jazzahead! and EJN;

- **Traditional Music Forum (TMF)** is a membership network of every kind of music organisation dedicated to promoting the interests, value and accessibility of Scottish traditional music, providing research, information, resources and publicity outlets and representing the sector in wider forums attached to government and public agencies, other traditional arts and the broader music sector;

- **Traditional Music and Song Association (TMSA)** is a membership organisation for individuals with a branch structure across Scotland that promotes live events and education work locally and nationally and is dedicated to lobbying and promoting the profile and importance of the grassroots of traditional music in Scottish life and culture;

- **Enterprise Music Scotland (EMS)** focuses on support and development for chamber music, representing (and dispensing devolved funding) over 70 promoters across Scotland, running an annual tours conference, seminars and training programmes, education projects and other profile-raising and artistic projects such as a national chamber music day residencies and new music commissions. It aims to establish showcasing opportunities for chamber music for national and international promoters. EMS has now taken responsibility for administering the smaller-scale funding awards for traditional music, devolved from Creative Scotland;

- **Scottish Brass Band Association (SBBA)** - the members of which are the bands and the area associations - organises competitive events, training programmes and provides communication between members and publicity for all brass band activities;
• **The Royal Scottish Pipe Band Association (RSPBA)** has a history of over a century, with a membership of most of the pipe bands in Scotland and associated branches and membership in several other countries. Most activities are competitive and as well as Scottish and localised events RSPBA runs the hugely successful World Piping Championship annually. It is part of a range of different and independent piping organisations which include the Pibroch Society, College of Piping and the Army School of Piping; and

• **The National Piping Centre** in Glasgow is unlike the other agencies above in that it is not a membership or federated organisation - but it should be mentioned here as a unique centre for the promotion of the heritage, history and learning of the music of the Great Highland Bagpipe and of piping in its many other forms, running classes, courses, school projects, concerts, the National Youth Pipe Band and an annual festival - and exporting tuition in piping to other countries each year as well as attracting students from around the world.

What is missing here, perhaps, is any organisation that could be the umbrella self-help group and ‘voice’ of professional classical music in Scotland. The **Association of British Orchestras (ABO)**, a UK organisation with its administrative base in London, has a small Scottish membership sub-group - the main orchestras, NYOS and some of the larger chamber ensembles - which meet a few times a year. EMS is clearly developing as Scotland’s champion of chamber music (although some consultees suggested that perhaps it does not give sufficient priority to Scottish-based performers). It is for these interests in the sector themselves to look at whether a collaboration might be necessary to promote the interests of classical music overall.

There are, of course, other groupings that operate in music education - the Heads of Instrumental Tuition Scotland (HITS) and the Scottish Association of Music Educators (SAME) - that are constituted differently - but which can and should be drawn into collective activity with network partners (especially such as in the ideas proposed below).

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49 This was amended to remove reference to the ABO as a “large” UK organisation. See Appendix A: Amendments, No. 4
8.3 Simple views of a complex landscape

There is no doubt that this is a complex, even cluttered, landscape. However, the feedback from our consultations was that these organisations are valued and we heard a lot of praise for their various initiatives. It was understood from the constituencies that each organisation represented (e.g. traditional music, jazz, piping etc) that their specialist knowledge of and, equally importantly, their focussed commitment to the chosen field, were essential elements in their ability to work effectively with and on behalf of their constituency.

This review is not about a detailed assessment or evaluation of each of these organisations individually, but a number of broad issues are evident:

- the range of **specialist knowledge and expertise** (genre-specific or related to parts of the supply chain) is fulfilling a valuable function;
- a self-determining, specialist focus gives these organisations added impetus - the enthusiastic and dedicated interest and knowledge within their staff and boards in the organisation’s specific area would weaken if they were merged in an amorphous, ‘all-music, all-functions’ agency;
- a number of organisations are fulfilling a **national** remit, but do not have the status or stability of being an acknowledged ‘national organisation’;
- there may be areas of **overlap** and instances of ‘mission creep’ as organisations seek funding for specific initiatives that may or may not align well with their core missions;
- **funding issues** are exerting pressure across these organisations, making forward planning difficult for some;
- there are some **gaps** in genre provision, for example for classical music; and
- there is no single organisation that can speak authoritatively on behalf of the **whole** of the music sector in Scotland.

The need for a single representative body to cover the whole of the music sector has been explored in the past, and that work led to the formation of the SMIA. The SMIA has not evolved into the body envisaged in that original work but is fulfilling a useful role as it now stands.
However, the need for a comprehensive music umbrella body is now less apparent, particularly given the sector’s positive views of existing organisations. But there is a need for the sector to talk within itself and identify collective issues.

There was clear evidence of interest across the sector in finding more effective mechanisms for sharing experience and identifying common issues. There is no single body that could easily evolve into one that represents the whole sector, nor is there a pressing need for one - but some kind of regular sector forum - genuinely comprehensive in representation - could go some way towards building greater cohesion and a collective voice.

Creative Scotland already provides support to many of the music-related agencies and bodies, and this is extremely valuable. The consultation found that this support was well received and that the work of these organisations was generally adding value.

However, there are gaps in coverage, and areas in which organisations may start to overlap. Others have defaulted to more specific roles than was perhaps originally envisaged (e.g. SMIA), although this is not necessarily a negative finding. What is now required is a more thorough review of the roles and functions of these bodies and the range of activities that they undertake in order to identify areas for change or intervention (if any).

A review could be simply a partnership process of defining, aligning and agreeing roles and responsibilities, between all the organisations involved and Creative Scotland. The primary issues for such a review to consider would be:

- the need to facilitate greater cohesion across the whole of the music sector (and a mechanism that could be adopted for the purpose);
- the complementarity of roles and functions across the already established bodies;
- devolved funding;
- the need to maintain effective genre and sector-specific support;
- operating strategically within an international policy (as discussed in the International section);
- the independence of bodies in lobbying activities; and
- financial sustainability and adequate resources.

Finally, it is worth making some brief comment about Scotland’s relationship with UK bodies both now and in future. At present, Scotland is represented on national music bodies by dint of a small number of key individuals seeking this kind of engagement. The sector would benefit from, for example, a more structured and regular form of engagement with UK Music.

While the outcome of a referendum on Scotland’s independence is not knowable, it could be that the requirement for a body equivalent to UK Music could become more marked in an independent Scotland.
9. Conclusions

9.1 Introduction

In this section we draw some conclusions from the review and present some suggestions for areas in which further action of intervention may be warranted.

9.2 General Conclusions

In the broadest terms, we have a number of general observations and conclusions.

1. At the first level, we find that music in Scotland is in generally good health. The quality, richness and diversity of our musical talent across all genres is without doubt, the infrastructure that supports the sector is improved and there is a huge and vibrant live music scene (professional and amateur) which is increasingly international in its profile and reach.

2. In addition to the cultural importance, music is also significant in economic terms, accounting for more than 10,000 direct jobs in Scotland, and many more indirectly through its contribution to tourism and hospitality.

3. In addition to professional music, there is a huge amateur and voluntary sector, and public interest in and involvement with music in Scotland is very widespread indeed.

4. There is a strong audience for music in Scotland, although audience diversity is limited in some respects (emphasis on the well educated and wealthier end of the population), and further research is needed, there are some challenges with audience development (see below).

5. There is considerable public sector support for music from a range of agencies, but imbalances in the distribution of funding, with a strong call for equity of opportunity and access to necessary support for all genres of music.

6. Although there is anxiety about the future of music education (expanded below), it is important to recognise the considerable progress that has been made across the formal and informal sectors and through the YMI in particular.
7. There is a need to clarify a national policy for music, that addresses both the issues and opportunities identified in this review, but that also provides guidance for the consideration of music within broader policy contexts.

9.3 Specific conclusions

Turning now to the thematic areas examined by the review, we have a number of more specific conclusions to highlight.

Making and Performing Music

8. For a country of its scale and population, Scotland is well served by orchestral provision. However, in contrast to the stable funding arrangements for the national companies, smaller ensembles find themselves in a less consistent and more precarious position. There was also feedback suggesting competition for repertoire and audiences in the classical sector50.

9. Jazz has been growing in Scotland for some years, but still suffers from a relative dearth of gigs and promoters than can develop audiences.

10. The traditional music sector is a clear success for Scotland, but still voices real concern about recognition and status.

11. Rock and pop in Scotland is as vibrant musically as it has ever been, but there are issues with parts of the commercial infrastructure that supports the sector (expanded below).

12. There is a very active and diverse live music sector in Scotland, both professional and amateur, that provides generally good coverage of genres, with gaps around the more experimental end of classical music, world and jazz in particular, and on promoting innovation and new artists more generally.

13. Although concentrated in the central belt (along with the population), we did not identify any major geographic gaps in the provision, with the obvious caveat that more remote areas will never have the same depth and range of provision as the more populated centres.

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50 This was amended to remove the term “anecdotal evidence”. See Appendix A: Amendments, No. 5.
14. Although the commercial live music industry has been growing strongly for some time, there are signs that this growth has slowed and may be starting to contract. This is a global trend and is not particular to Scotland.

15. The growth in festivals, and their sheer diversity, is a success story, but with growing limitations on support funding for regular promoters, there is a risk of discouraging or displacing promotion that might otherwise happen at other times of the year.

16. Pressure on subsidised venues and promoters is constraining the range of programming that they are able to offer, impacting on audience development and the diversity of the music scene in Scotland.

17. Voluntary promoters are widespread and play a crucial role in serving local audiences with a very wide range of music.

18. Venue coverage is good at all scales, and there is no evidence of a need for a large scale building programme. There is a need, however, to address the lack of a flexible mid-scale venue in Edinburgh.

19. There is a need for a strategic touring framework in Scotland to address gaps in provision and realise the range of opportunities to serve audiences across Scotland.

20. Audience development is an ongoing challenge, and while the national companies have access to good box office data and advice, smaller music organisations often lack the expertise and capacity to respond creatively to this kind of information.

**Recorded Music**

21. The recording industry is under real pressure, but there is no indication that Scotland fares particularly worse than elsewhere in the UK (other than London and the South East).

22. There is a genre bias in the recording industry towards traditional and rock/pop with less provision in classical and jazz.

23. Financial pressure across the recording industry means less money in the system. The impacts of this are that artists are required to invest more
themselves, transferring risk down the supply chain. Most musicians are struggling to make a good living.

24. There are gaps in the recording industry supply chain in Scotland, particularly relating to the range of quality of agents and managers (which is also true of the live sector) and in distribution and retail.

25. There are many Scottish labels that have continued to produce high quality music and are managing to survive in very challenging trading conditions. This should be recognised along with the pressures on their businesses.

26. Scotland’s broadcast media is widely perceived as not doing enough for music in Scotland.

27. There is a clear need for entrepreneurship, investment and internationalisation to support the sustainability of the recording industry.

International

28. Scotland’s music sector has a strong and growing international profile and reputation for talent.

29. There is a large, and underserved, market on our doorstep in the rest of the UK – this should be developed within broader efforts on ‘international’ work.

30. There are numerous examples of successful showcasing activities (with some gaps e.g. chamber), but this now needs long term strategic approach, and Creative Scotland is well placed to lead development of a strategy (to include consistent means of evaluation) with other agencies/partners.

31. Specialist skills and knowledge of genres and markets are essential to run showcases and overseas promotions, and there is a need for follow-up support to support further artists’ development.

32. Music is a powerful tool for cultural diplomacy and representation but is limited in genre terms (only classical music).

33. International artists do play in Scotland, but these tend to be relatively mainstream and there are major genre gaps (e.g. jazz). This is largely a funding issue and relates to the issues with promoters and touring support (see above).
34. The Creative Scotland policy of seeking to develop partnerships with overseas agencies is a good one and can help bring visiting artists to Scotland.

35. Go-and-see funding is essential to encourage international expertise and contacts to grow in Scottish promoters.

Music Education and Youth Music

36. YMI is widely admired and praised for its achievements in music education. Its achievements have been legion and its value is underlined by all evidence and comments.

37. The informal music education sector is now a strong and essential (specialists) contributor.

38. The formal sector is inconsistent across the country, and there is growing concern that the state sector is falling behind, particularly within classroom and curriculum music provision.

39. Music education in primary schools has improved, partly due to YMI and the P6 target and there is a greater level of activity in early years.

40. Free instrumental tuition is being eroded in most local authorities therefore some young people are being discouraged.

41. There is growing competition for places in higher education due to changes in English tuition fees.

42. There is a huge range of music courses in further education, but a widespread view that supply exceeds demand.

43. The national youth music organisations are strong and of a high quality (and operate in part as valuable development organisations) They should be acknowledged as permanent and given security in recognition of their national status.

44. The Youth Music Forums are beneficial and need more development.

45. We also found that YMI faces some issues and threats, and that is now needs greater stability and improved local authority inter-relationships. It is the perfect time to revisit the review of youth music in Scotland and YMI is well placed to
lead a new phase and make a new national strategy with partners from across the formal and informal sectors.

People in Music

46. As noted, music talent is strong in Scotland, and the review found that more of that talent is now choosing to remain and work in Scotland – something that was not previously the case in areas like rock and pop.

47. Volunteers play an active and crucial role across all areas of music, but are facing increasing pressure to develop professionalised skills and need training and support to meet these demands.

48. There are known skills issues and gaps facing the music sector, including technical skills in live music and business, IT and marketing skills across the sector.

49. The role played by key individuals in the music sector should not be underestimated. Scotland needs more talented agents, managers and creative producers.

50. It is important that Creative Scotland and other support agencies maintain a high degree of focus on music, supported by real knowledge and expertise in the sector.

Networks and agencies

51. There is a good spread of networks, trade associations and support agencies in the music sector, and they are generally found to be working effectively and delivering value to the sector.

52. There is evidence of funding pressure on some of these organisations, inhibiting forward planning and encouraging a degree of ‘fund-chasing’ and potential ‘mission creep’.

53. Specialist knowledge and understanding within these organisations is essential and there is no clear rationale for consolidation. This is, however, a complex landscape and there is evidence of overlap in some places.
54. It is important that the networks and agencies maintain an outward looking focus and that they are supported to do so. Similarly, many are working on a national scale but do not have ‘national’ status.

55. There is no one organisation that can speak with a single voice for the whole of the music sector, and no clear mechanism for achieving that, although the need for such a body is less clear than in the past. There is, however, a need for a mechanism through which the sector can discuss and agree issues of collective interest.

9.4 Recommendations

We have a number of suggestions for activities that could now be taken forward. Some are broad and cross-sector, while others are more specific, but all follow from the findings and conclusions outlined above. They are intended to be measures and steps that would not only help to address the issues that the review has identified, but will also allow music in Scotland to realise its potential on a wider stage. For ease, we have presented these in a tabular form, as Figure 9.1 below.
**Figure 9.1: Suggestions for future action**

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<thead>
<tr>
<th>Thematic area</th>
<th>Issues/ rationale for action</th>
<th>Suggestions</th>
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<tbody>
<tr>
<td>Music policy</td>
<td>The lack of a national music policy means that there is no clear framework for action, and no policy context against which the impacts on the music sector of other policy measures can be assessed. Effective policy, and policy evaluation, is constrained by lack of reliable and accessible data and information. Music faces particular challenges in this respect due to its complexity, its reach into different areas of activity and its poor fit with existing datasets (in particular economic data).</td>
<td>Creative Scotland could lead this process, building on the findings of this review and advocating for a clear policy statement from the Scottish Government. Creative Scotland could also engage with the range of other key partners to agree a music policy for the sector. Further work is needed to establish a consistent and reliable measurement framework against which the impacts of a music policy might be assessed. This should consider economic, social and cultural impacts.</td>
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<tr>
<td>International</td>
<td>The cultural and economic development of music can be driven in part by greater international activity. The review has identified areas of significant opportunity, and highlighted ways of enhancing the international impacts of music from Scotland. Energetic (and often effective) but uncoordinated approach to internationalisation (import and export) with insufficient consistent evaluation and limited follow-up support. There is a relatively limited pool of people and organisations with international expertise, knowledge and contacts. International promotion activities are useful, but follow-up support has been identified as lacking. This risks undermining the benefits of the initial support for promotional activity.</td>
<td>There is a clear need to develop a coherent and comprehensive strategy for international activity and support in music. This should follow the principles set out in this review (Section 5) and should be developed in partnership with the appropriate specialist agencies - with Creative Scotland well-placed to take the lead. It is essential that an international strategy has the agreement of all funders and partners, and is long term in its focus, ambitions and commitment. (and backed up by consistent tracking and evaluation). There should be follow-up programmes developed to support artist beyond initial exposure through international showcases/ trade fairs etc.</td>
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<tr>
<td>Thematic area</td>
<td>Issues/rationale for action</td>
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| International (cont)| The music used for directly sponsored government cultural diplomacy is too narrow (classical only) and fails to promote the full range of music in Scotland (or to give a complete picture of a modern Scotland).  
Effective partnerships with overseas agencies can help the flow of music from and to Scotland with consequent economic and cultural benefits for the sector and for audiences.  
Limited range of overseas artists coming to perform in Scotland outwith major festivals.  
International networking is crucial, for organisations and individual alike to develop skills and build knowledge and contacts in international markets. | The Scottish Government should be encouraged to broaden the range of musical styles used for cultural diplomacy.  
Creative Scotland should continue to develop its relationships with a range of overseas agencies.  
Networks and agencies should continue to network internationally, and be supported to do so under the auspices of a coherent international policy framework.  
'Go and see' funding should be targeted to support this kind of international networking. |
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<th>Thematic area</th>
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| Live Music                 | The lack of clear touring framework, and collaborative approach, limits the range of music available to people across Scotland.  
|                            | The financial constraints on promoters are limiting their ability to take risk in programming, impacting both on the diversity of music in Scotland and on audience development, in particular for relative minority music Creative Scotland.  
|                            | The temptation to invest in more festivals or special events risks diverting resources from support for year round programming, and thus weakening the foundations on which festivals, and festival audiences, are built.  
|                            | Edinburgh lacks a suitable mid-scale venue.                                                   | Creative Scotland should review touring in greater detail and (with reference to principles outlined in Chapter 3) develop appropriate mechanisms to sustain long term touring frameworks in Scotland.  
|                            |                                                                                             | Provide greater stability for promoters and support opportunities to take risks in programming, especially in under-represented genres such as jazz.  
|                            |                                                                                             | Support structures should seek to find a balance between continuing to support Scotland’s vibrant festival scene with the need for long-term, sustainable year round programming of music.  
<p>|                            |                                                                                             | Conduct a definitive review of venue provision in Edinburgh and established the feasibility for a new mid-scale venue (either new build or refurbishment). This would for Creative Scotland and City of Edinburgh Council to progress. |
| Commercial recording industry | The recording industry is a key part of music in Scotland and must find a sustainable model that allows greater retention of IP and economic value in Scotland. | All of the partners should work together and agree a comprehensive and specific programme of support for the commercial music sector along the lines suggested in Chapter 4. The economic development agencies could have a significant role in this area. |</p>
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| Music Education and Youth Music   | The success of YMI and consistent efforts in music education notwithstanding, there is now erosion of free music tuition with consequent risks to future generations of potential talent.  
The review has identified a range of issues with music education and youth music that now need to be addressed (Chapter 6).  
YMI has been a clear success - and now needs to continue to develop as a sustainable model for the long-term future. | Now is the time to review music education and youth music in Scotland ten years on from What Going On. YMI should lead this review, taking account of the issues highlighted in this review (Chapter 6).  
Music education and youth music needs a refreshed approach and a new national strategy to guide future funding and development.  
YMI should continue, but in a ‘next phase’ looking at issues relating to the 80/20 funding split and the formula used to distribute money to local authorities - and looking at the key part that YMI plays in an overall national youth music strategy. |
| Funding and assessment             | There are clear differences in the assessment (and treatment) of the national companies and other music organisations – most obviously the ensembles, but also in other genres.  
Only one ensemble has regular funding, and the position of others could become less stable.                                                                 | There is an opportunity to refresh the approach to quality assessment of music organisations, perhaps making greater use of external assessment.  
Consider means to creating greater stability in the ensembles (an indeed in other genres) through more stable funding patterns. |
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| People in music       | There are identified skills gaps and shortages in music (see Chapter 7). There are also layers of the sector in which the talent pool is less well developed (agents/ managers etc)  
  The level of knowledge and understanding of music within the main public support agencies in Scotland is variable. Having the right expertise at the right level is vital.                                                                                   | Creative Scotland could work with the appropriate partners (e.g. CC Skills, Skills Development Scotland etc) to ensure that skills issues are understood and addressed in partnership with HE/FE and training providers. There is also an advocacy role to encourage the sector itself to invest more in skills and training and development.  
  Creative Scotland’s own expertise in music should continue to be focussed and maintained at a high and authoritative level and should continue to exert a role in helping other support agencies to understand the sector and its needs. |
| Networks and agencies | The various networks and agencies supporting music are valuable to, and value by the sector, but there is a need to improve their sustainability, enable forward planning and iron out overlaps and duplication of effort.  
  One of the gaps is in classical music, EMS and ABO notwithstanding.  
  There is no collective voice for the music sector.  
  Some of the agencies are operating at national level but without national status.                                                                 | The music networks and agencies should collaborate with Creative Scotland on this review to dovetail and agree their different purposes and operations.  
  Review the need and feasibility of establishing a classical specialist support agency.  
  Creative Scotland could work with the specialist agencies to find ways of collective communication and a collective voice or music.  
  Agencies should be provided the stability of long term organisations.                                                                                                       |
Appendix A: Amendments

1. p40: the Association of British Orchestras requested the removal of a comment about “anecdotal” evidence of competition between orchestras for audience and repertoire. Data subsequently provided by the ABO demonstrate growing audience numbers.

2. p57: a comment was removed about Creative Scotland being alone amongst its UK counterparts in investing in recordings as the Arts Council England provides funding to NMC Recordings. Although this is different to the funding of actual recordings provided by Creative Scotland through the Quality Production Fund, the comment was removed to avoid confusion.

3. p89: following clarification, this paragraph was amended to reflect the fact that the National Youth Orchestra of Great Britain continues to audition in Scotland.

4. p115: the reference to the ABO as a “large UK organisation” was amended to read a“UK organisation”.

5. p120: sentence amended to remove the use of the term “anecdotal”.