Borgarráð

#### Tónlistarborgin Reykjavík - tillögur starfshóps

Lagt er til að borgarráð samþykki tilraunaverkefni um Tónlistarborgina Reykjavík til ársloka 2020 og að auglýsa eftir verkefnastjóra Tónlistarborgarinnar Reykjavík. Áætlaður kostnaður fyrir júlí til desember árið 2017 er 4.855.000 kr. vegna launa og launatengdra gjalda og 1.652.000 vegna starfs- og verkefnakostnaðar, samtals 6.507.000 kr. sem greiðist af kostnaðarstað ófyrirséð (09205). Kostnaði vegna áranna 2018-2020 er vísað til fjárhagsáætlunargerðar. Verkefnisstjóri Tónlistarborgarinnar vinni að eflingu tónlistar í Reykjavík í samræmi við hjálagða skýrslu og tillögur starfshóps um Tónlistarborgina Reykjavík. Lögð eru fram til kynningar drög að erindisbréfi ráðgjafanefndar um Tónlistarborgina Reykjavík sem verður verkefnastjóra til ráðgjafar og stuðnings. Verkefnastjórinn geri starfs- og fjárhagsáætlun fyrir hvert starfsár leggur fyrir borgarráð og menningar- og ferðamálaráð.

#### Greinargerð:

Reykjavík hefur á undanförnum árum orðið þekkt sem fóstra tónlistar og í borginni býr mikill mannauður sem skapar fjölbreytt og kraftmikið tónlistarlíf. Tónlist er mikilvægt samfélagslegt afl og sjálfstæð uppspretta menningarlegra og efnahagslegra gæða auk þess að vera farvegur fyrir mikil sóknarfæri í frjóu borgarumhverfi. Með því að móta heildstæða stefnu og skýra aðgerðaáætlun um Tónlistarborgina getur Reykjavíkurborg nært enn frekari uppbyggingu öflugs tónlistarlífsins með þeim samfélags- og efnahagslega ávinningi sem því fylgir.

Dagur B. Eggertsson

Hiálagt:

Drög að erindisbréfi ráðgjafanefndar um Tónlistarborgina Reykjavík. Skýrsla starfshóps um Tónlistarborgina Reykjavík dags. 26. maí 2017.

## **ERINDISBRÉF**

#### Ráðgjafanefnd um Tónlistarborgina Reykjavík

#### Ábyrgðarmaður:

Borgarstjórinn í Reykjavík.

#### Inngangur:

Tónlistarborgin Reykjavík er tilraunaverkefni til þriggja ára með það að markmiði að efla tónlistariðnað og tónlistarhagkerfið í Reykjavík. Verkefnið Tónlistarborgin Reykjavík snýst um að koma á fót öflugu stuðningskerfi sem skapar hagstæð skilyrði fyrir gróskumikla tónlistarstarfsemi um alla Reykjavíkurborg og undirstrikar í verki lifandi og skapandi tónlistarlíf sem dregur að fólk og fyrirtæki til starfa, búsetu og dvalar í lengri eða skemmri tíma.

#### Hlutverk ráðgjafanefndar:

Að vinna að tilraunaverkefni um tónlistarborgina Reykjavík í samráði við hagsmunaaðila í tónlistarlífinu.

#### Helstu verkefni:

- Að vinna að forgangsröðun, útfærslu og framkvæmd skilgreindra tillagna um Tónlistarborgina Reykjavík.
- Að vera til ráðgjafar og stuðnings verkefnastjóra Tónlistarborginnar sem gerir starfsog fjárhagsáætlun fyrir hvert starfsár og leggur fyrir borgarráð og menningar- og ferðamálaráð.

#### Ráðgjafanefnd skipa:

Fulltrúi menningar- og ferðamálasviðs (formaður).

Fulltrúi tilnefndur af borgarstjóra.

Fulltrúi skóla- og frístundasviðs.

Tveir fulltrúar tilnefndir af ÚTON.

#### Starfsmaður:

Verkefnisstjóri Tónlistarborginnar Reykjavík.

#### Til ráðgjafar og samstarfs:

Ráðgjafanefnd hafi samráð við tónlistargeirann, þ.e. tónlistarfólk, eigendur tónleikastaða, upptökustjóra, hagsmunasamtök og aðra hagsmunaaðila. Þá leiti starfshópurinn ráðgjafar innan og utan borgarkerfis hjá aðilum með sérþekkingu á viðfangsefninu.

#### Starfstímabil:

Ráðgjafanefnd er skipuð til ársloka 2020 og skili ábyrgðarmanni áfangaskýrslum að loknu hverju starfsári.

Reykjavík, [Dags.]



5/26/2017

# Tónlistarborgin Reykjavík

- tillögur starfshóps



Menningar- og ferðamálasvið Reykjavíkurborgar. Skilagrein starfshóps um Tónlistarborgina Reykjavík.

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# 1. Skilagrein starfshóps um Tónlistarborgina Reykjavík

Reykjavík hefur á undanförnum árum orðið þekkt sem fóstra tónlistar og í borginni býr mikill mannauður sem skapar fjölbreytt og kraftmikið tónlistarlíf. Tónlist er mikilvægt samfélagslegt afl og sjálfstæð uppspretta menningarlegra og efnahagslegra gæða auk þess að vera farvegur fyrir mikil sóknarfæri í frjóu borgarumhverfi. Með því að móta heildstæða stefnu og skýra aðgerðaáætlun um Tónlistarborgina getur Reykjavíkurborg nært enn frekari uppbyggingu öflugs tónlistarlífsins með þeim samfélags- og efnahagslega ávinningi sem því fylgir.

Tónlistarborgin Reykjavík einkennist af ríku og gróskumiklu tónlistarlífi með skýra ímynd sem laðar að íbúa, fyrirtæki og ferðamenn. Viðeigandi stuðningskerfi nýtir kosti tónlistar til verðmætasköpunar, iðandi mannlífs og fjölbreyttra möguleika fyrir fólk á öllum aldri til að skapa og njóta.

Aðstandendur tónlistarborgar móta og skipuleggja öflugt stuðningskerfi sem skapar hagstæð skilyrði fyrir gróskumikla tónlistarstarfsemi um alla Reykjavíkurborg. Lögð er áhersla á heildræna sýn þar sem grunnurinn er treystur með öflugri og aðgengilegri tónlistarmenntun, ræktun grasrótar, og uppbyggingu tónlistariðnaðar sem skapar möguleika til þess að njóta hæfileika sinna og láta drauma rætast.

Reykjavík skilgreinir sig sem unga og ferska, alþjóðlega menningarborg þar sem áhersla er m.a. lögð á skapandi greinar og þekkingariðnað. Háskólasamfélag byggir að stórum hluta á ungu og menntuðu fólki sem vill njóta menningar. Sterkur tónlistargeiri og gott aðgengi að lifandi tónlist eykur lífsgæði borgarbúa og er aðlaðandi fyrir fjölþjóðlegt samfélag fólks og fyrirtækja. Það er þannig ekki tilviljun að víða eru viðskiptaráð (Trade Council) mikilvægir samstarfsaðilar borgaryfirvalda og annarra lykilaðila við að móta stefnu og fjármagna aðgerðir sem efla undirstöður tónlistarborganna. Blómlegt tónlistarlíf styður afar vel við markmið Reykjavíkurborgar til framtíðar og nær langt umfram menningarstefnu borgarinnar.

Reykjavík er ekki síst þekkt sem heimaborg framúrskarandi tónlistarfólks og framsækinna tónlistarhátíða sem náð hafa athygli og vinsældum víða um heim. Um margra ára skeið hefur ímynd og kynningarstarf borgarinnar notið góðs af hæfileikum íslensks tónlistarfólks. Það má því leiða rök að því að ímynd íslenskrar tónlistar sé samofin ímynd Reykjavíkur sem menningarborgar og áhugaverðs áfangastaðar. Markmið Reykjavíkurborgar er ekki að fjölga ferðamönnum; fremur að laða hingað fólk sem eru menningarnjótendur, skilja eftir sig umtalsverða fjármuni í hagkerfi borgarinnar og auðga menningarlíf borgarbúa m.a. með því að búa til eftirspurn sem styður mun fjölbreyttari flóru viðburða en heimamarkaðurinn einn gæti gert.

# 1.1. Verklag starfshóps um Tónlistarborgina Reykjavík

Starfshópur um Tónlistarborgina Reykjavík var skipaður af borgarstjóranum í Reykjavík þann 9. desember 2016. Hlutverk hópsins var að móta tillögur um Tónlistarborgina Reykjavík og áætlun um framfylgd þeirra í samráði við hagsmunaaðila í tónlistarlífinu. Fjölþættum verkefnum starfshópsins ásamt grunngögnum sem hafa bæri til hliðsjónar er nánar lýst í erindisbréfi hans (fylgigagn 5.1). Hópurinn vann á þriggja mánaða tímabili - frá janúar 2017 til loka mars - að því að móta tillögur um Tónlistarborgina Reykjavík og áætlun um framfylgd þeirra sem hér eru kynntar.

## Starfshópinn skyldu skipa:

- Fulltrúi menningar- og ferðamálasvið (formaður).
- Fulltrúi umhverfis- og skipulagssviðs.
- Fulltrúi, skrifstofa eigna og atvinnuþróunar.
- Fulltrúar tónlistargeirans.
- Og starfsmaður frá menningar- og ferðamálasviði væri hópnum til aðstoðar.

Starfshópurinn var fullmannaður og kominn til verka 4. janúar 2017 en hann skipuðu: Svanhildur Konráðsdóttir formaður, Hildur Gunnlaugsdóttir/Þorsteinn Rúnar Hermannsson (USK), Bjarni Daníelsson/Óli Örn Eiríksson (SEA), Sigtryggur Baldursson, Jakob Frímann Magnússon og Bryndís Jónatansdóttir fulltrúar tónlistargeirans.

Starfsmaður hópsins var Signý Pálsdóttir (MOF). Sólrún Sumarliðadóttir MA í menningarstefnu og listrænni stjórnun og tónlistarmaður var ráðin sérstaklega að verkefninu. Að auki var Dr. Bjarni Snæbjörn Jónsson stjórnunar- og stefnumótunarráðgjafi fenginn til liðs sem sérstakur ráðgjafi í tengslum við vinnustofu og úrvinnslu hennar.

Starfshópurinn fundaði vikulega mest allt tímabilið og stóð fyrir fjölmennri vinnustofu þann 8. febrúar með hagsmunaaðilum sem tengjast tónlistarlífinu í borginni á margvíslegan hátt. Hátt á annað hundrað manns var boðið og um 70 tóku þátt í samráðinu, sem fór fram undir handleiðslu Bjarna Snæbjörns Jónssonar stjórnunar- og stefnumótunarráðgjafa.

Auk gagna, sem söfnuðust á samráðsfundinum og gerð er grein fyrir í viðauka, leitaði starfshópurinn fanga hjá sviðum Reykjavíkurborgar (menningar- og ferðamálasviði,

skóla- og frístundasviði, umhverfis- og skipulagssviði, íþrótta- og tómstundasviði og skrifstofu eigna- og atvinnuþróunar) til mennta- og menningarmálaráðuneytisins, ÚTÓN, STEF, Íslandsstofu, Háskóla Íslands, Háskólans á Bifröst, Ríkisskattstjóra, Hagstofunnar og ýmissa annarra og var t.a.m. send út könnun til rekstraraðila um aðbúnað og starfsgrundvöll tónleikastaða í borginni.

Mikilvægur liður í vinnu starfshópsins hefur einnig verið að líta til og afla gagna frá öðrum borgum sem skilgreina sig sem tónlistarborgir auk þess sem upplýsinga hefur verið aflað frá sérfræðingum og samtökum sem sérhæfa sig í umhverfi og uppbyggingu tónlistarborga. Helstu gögn fylgja skilagrein hópsins sem viðauki.

Skýrsla, sem unnin var fyrir Samtök sveitarfélaga á höfuðborgarsvæðinu (SSH) og kom út árið 2014, *Sóknarfæri skapandi greina á höfuðborgarsvæðinu* (höf: Margrét Sigrún Sigurðardóttir, Júlía Björnsdóttir, Rannsóknarmiðstöð skapandi greina) hefur einnig verið höfð til hliðsjónar, en umtalsverður samhljómur er á milli lykil niðurstaðna þeirrar skýrslu og þess efnis sem safnast hefur við vinnu starfshóps um tónlistarborg.

Eitt af verkefnum starfshópsins var að kortleggja og safna talnagögnum um umfang tónlistarlífs og tónlistariðnaðar í Reykjavík. Í ljós kom að slíkar upplýsingar eru síður en svo aðgengilegar eða hreinlega alls ekki til og reyndist þetta ein helsta hindrunin í vinnu starfshópsins. Mjög mikilvægt er að bæta úr þessu, því að erfitt er að setja mælikvarða og markmið í uppbyggingu þegar núverandi umfang liggur ekki fyrir. Það reyndist því liggja fyrir utan tímaramma og möguleika starfshópsins að afla ýmissa þeirra gagna sem getið er um í erindisbréfi hans. Hins vegar er bent á að nú stendur yfir vinna í Háskóla Íslands við rannsóknina *Hagtölur í íslenskum tónlistariðnaði* sem var pöntuð af Samtóni. Áætlað er að þeirri vinnu ljúki á árinu 2017 og mun rannsóknin vonandi bæta að einhverju leyti þennan afleita skort á tölulegum upplýsingum um tónlistarlífið sem eru nauðsynlegar fyrir frekari skref í átt að því að efla Reykjavík sem tónlistarborg.

Hér á eftir eru kynntar 8 forgangstillögur starfshópsins sem byggja á þeim fjórum forsendum og velgengnisþáttum sem dregnir hafa verið út úr öllum þáttum vinnunar, þá greining á styrkleikum og veikleikum í samræmi við erindisbréf og loks yfirlit um allar tillögur.

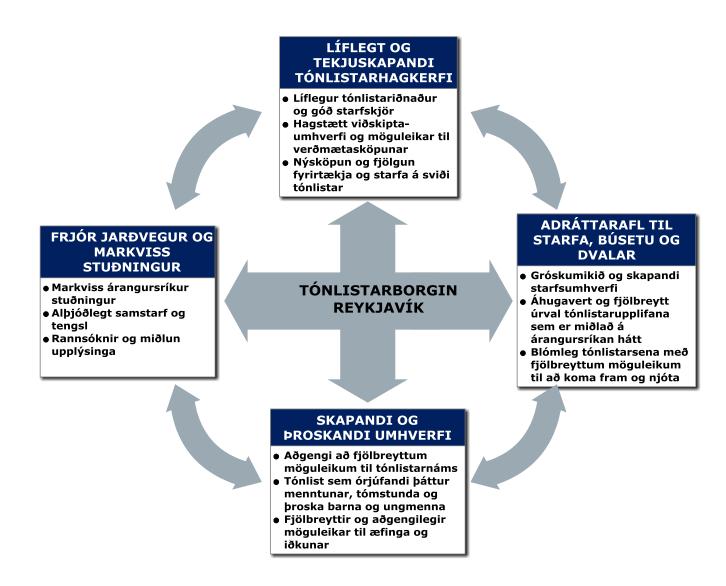
Gerð var tilraun til að leggja mat á kostnað fyrir Reykjavíkurborg og skilgreina bæði ábyrgðaraðila og helstu samstarfsaðila þeirra tillagna sem starfshópurinn leggur fram – en rétt er að benda á að víða er um gróft mat að ræða sem þarfnast nánari rýni vilji borgaryfirvöld forgangsraða aðgerðum og setja í farveg eða forsendur liggja ekki fyrir.

# 2. Forsendur og velgengnisþættir

# Framtíðarsýn - hlutverk - áherslur

Verkefnið Tónlistarborgin Reykjavík snýst um að koma á fót öflugu stuðningskerfi sem skapar hagstæð skilyrði fyrir gróskumikla tónlistarstarfsemi um alla Reykjavíkurborg og undirstrikar í verki lifandi og skapandi tónlistarlíf sem dregur að fólk og fyrirtæki til starfa, búsetu og dvalar í lengri eða skemmri tíma.

Eftirfarandi er sú sýn sem liggur til grundvallar hverju meginmarkmiði ásamt þeim verkefnum sem þeim tengjast og talin eru mikilvægt að ráðast í.



# 3. Forgangstillögur um Tónlistarborgina Reykjavík

Árangur veltur á því að vel takist til í upphafi að byggja upp sterka innviði til þess að fylgja verkefninu eftir. Lagt er upp með tiltekin forgangsverkefni sem eru nauðsynleg til þess að mynda þann grunn sem verkefnið og árangur af því hvílir á.

Það fyrsta sem koma þarf til og mótar farveg fyrir árangursríka framkvæmd, er að verkefninu verði sett skýr umgjörð sem tryggir nauðsynleg aðföng til stjórnunar og framkvæmda. Því er lagt upp með það að í upphafi verði fenginn til verksins starfsmaður í fullu starfi til þess að fylgja eftir frekari umræðu og útfærslu og fylgja eftir þeim verkefnum sem sú umræða leiðir til. Lagt er til að jafnframt verði kannaðir möguleikar á samstarfi við ÚTÓN þar sem verkefnið yrði vistað en það unnið undir stjórn og eftirliti stýrihóps sem skipaður er til þess að fylgja eftir fjármunum og tryggja að þeir nýtist til fulls við að ná settum markmiðum.

# 3.1. Farvegur til framkvæmda - verkefnisstjórn, samhæfing, aðstaða

Yfirsýn og samhæfing er nauðsynleg þegar kemur að markvissri uppbyggingu á tónlistarlífi og tónlistariðnaði í borginni. Verkefnastjóri Tónlistarborgar gegnir ráðgjafa- og samhæfingarhlutverki í tónlistarlífinu - er fjöltengið fyrir greinina í borginni. Verkefnastjóri sinnir upplýsingaöflun, greiningarvinnu, aðstoð, ráðgjöf og alþjóðlegu samstarfi. Verkefnastjóri hefur aðstöðu hjá ÚTÓN og starfar í náinni samvinnu við þau ásamt sérstöku 3ja manna ráðgjafateymi Tónlistarborgarinnar Reykjavík sem fylgi verkefninu eftir. Stofnkostnaður við upphaf verkefnisins yrði laun verkefnastjóra, skrifstofuaðstaða og verkefnafé.

Ábyrgðaraðilar: Skrifstofa borgarstjóra, menningar- og ferðamálasvið

Helstu samstarfsaðilar: ÚTÓN

# 3.2. Kortlagning tónlistarlífsins

Til þess að geta sett mælikvarða og markmið um uppbyggingu tónlistariðnaðar í borginni er nauðsynlegt að hafa upplýsingar um umfang. Markvissa kortlagningu, upplýsingaöflun og greiningu á öllum helstu lykilþáttum sem lúta að tónlistargeiranum skortir tilfinnanlega og er nauðsynlegt að bæta úr því. Reykjavíkurborg einsetji sér að stuðla að úrbótum í þessum efnum í samvinnu við ÚTÓN, háskólasamfélagið, Hagstofuna og aðra opinbera aðila.

Ábyrgðaraðilar: Ráðuneyti, Hagstofa, HÍ

Helstu samstarfsaðilar: ÚTÓN, háskólasamfélagið, Hagstofan, Íslandsstofa

# 3.3. Stuðningur við nýsköpun

Nauðsynlegt er að styrkja tengsl tónlistariðnaðar og tónlistarfólks við nýsköpunargeirann, en tónlistartengd fyrirtæki hafa ekki átt greitt aðgengi að sprotaumhverfinu, sem hefur hamlað mjög uppbyggingu tónlistariðnaðar hér á landi. Reykjavíkurborg leiðir saman Háskólana og

fjármögnunaraðila, í samstarfi við nýsköpunarmiðstöð, í því markmiði að koma á fót STARTUP MUSIC REYKJAVIK til að styðja og þróa nýsköpun og viðskiptaþróun í tónlistargeiranum.

Ábyrgðaraðilar: Nýsköpunarmiðstöð

Helstu samstarfsaðilar: Reykjavíkurborg, ÚTÓN, Íslandsstofa, háskólar, fjármögnunaraðilar

#### 3.4. Tónlistarklasi

Stofnun klasa fyrir tónlistarstarfsemi þar sem t.d. væri hægt að fá aðgang að vinnu-, æfinga-, og upptökurými á viðráðanlegu leiguverði, auk þess að tónlistartengd fyrirtæki hefðu þar aðstöðu, ráðgjafar/mentorar væru starfandi með stoðþjónustu, sameiginlegt funda og vinnusvæði o.fl. Lagt er til að horft verði til sambærilegra verkefna í öðrum tónlistarborgum, s.s. Toronto, Seattle og Chicago.

Ábyrgðaraðilar: Fagfélög, einkaaðilar

Helstu samstarfsaðilar: ÚTÓN, Íslandsstofa, Reykjavíkurborg,

## 3.5. Vinnurými tónlistarmanna

Vinnuaðstöðuleysi tónlistarmanna í borginni hefur lengi verið aðkallandi vandamál. Með því að styrkja aðila í sem flestum hverfum borgarinnar til að innrétta með fullnægjandi hætti og leigja út æfinga- og vinnurými fyrir tónlistarmenn á sanngjörnu verði verður til hvati fyrir eigendur á illa nýttum rýmum í borginni, t.d. fyrir iðnaðarhúsnæði í biðstöðu, til að skapa aðstöðu til tónlistaræfinga. Viðkomandi skuldbindi sig við styrkveitingu til að leigja út aðstöðuna í að lágmarki 2-3 ár.

Ábyrgðaraðilar: Reykjavíkurborg (SEA), fagfélög tónlistarmanna, einkaaðilar

Helstu samstarfsaðilar: ÚTÓN

# 3.6. Skólahljómsveitir borgarinnar

Markmið og stefna námsins í skólahljómsveitunum skilgreind með fjölbreytilega og metnaðarfulla tónlistarmenntun og greitt aðgengi barna að leiðarljósi. Aðstaða og hljóðfærakostur skólahljómsveitanna bættur með tilliti til fjölbreytilegs starfs hljómsveitanna, og möguleikar kannaðir á að auka samspil í smærri hópum með auknu kennslumagni á hvern nemanda.

Ábyrgðaraðilar:Reykjavíkurborg (SFS)

Helstu samstarfsaðilar:

# 3.7. Harpa tónlistarhús

Tryggja rekstrarhæfi Hörpu sem miðstöðvar tónlistar í Reykjavík og auka þannig aðgang fjölbreyttrar tónlistar, tónlistartengdra viðburða og samræðuvettvangs, nýsköpunar og barnastarfs að húsinu.

Ábyrgðaraðilar: Reykjavíkurborg, ríkið

Helstu samstarfsaðilar: Tónlistarlífið, samstarfaðilar úr atvinnulífi o.fl.

# 3.8. Kynning íslenskrar tónlistar

Íslensk tónlist og tónlistarviðburðir verði skilgreindir sem kjarni í kynningu á Reykjavík. Virku samstarfi komið á milli Höfuðborgarstofu, ÚTÓNs, Íslandsstofu, Leifsstöðvar ofl. með markvissa kynningu íslenskrar tónlistar að markmiði. Aðgengi ferðamanna og íbúa borgarinnar að tónlist verði aukið í gegnum samvinnu Upplýsingarmiðstöðvar ferðamanna, tónlistamanna og tónleikahaldara að stórbættu viðburðadagatali www.Visitreykjavik.is og sölu miða á menningarviðburði í gegnum þá síðu.

Ábyrgðaraðilar: Reykjavikurborg (Höfuðborgarstofa) Helstu samstarfsaðilar: ÚTÓN, Íslandsstofa, Leifsstöð ofl

# 4. Greining á styrkleikum og veikleikum sbr. erindisbréf starfshóps

# Styrkleikar Reykjavíkur á sviði tónlistar

Að safna upplýsingum um hvað þarf að vera til staðar í tónlistarborg og greina að hvaða marki Reykjavík uppfyllir þær kröfur.

Skýrslan *The Mastering of a Music City* sem var gefin út af Music Canada árið 2015 lá að nokkru leyti til grundvallar erindisbréfinu og hefur haft umtalsverð áhrif á nálgun líkt og í öðrum borgum sem nýlega hafa unnið að því að skilgreina sig sem tónlistarborgir, s.s Árósar í Danmörku, Toronto í Kanada og Katowice í Póllandi. Í *The Mastering of a Music City* er tónlist skilgreind sem mikilvægur útgangspunktur og drifkraftur í þróun og vexti borgarsamfélaga og gengið út frá því að fimm þættir þurfi að vera til staðar í borgum sem vilja skilgreina sig út frá tónlist:

- Öflugur kjarni tónlistarmanna og tónlistarhópa
- Blómlegt tónlistarlíf
- Góðar aðstæður til tónlistarflutnings
- Áhugasamir og virkir áheyrendur
- Atvinnustarfsemi sem vinnur í tengslum við tónlistargeirann

Reykjavík uppfyllir að mati starfshópsins sannarlega þessi skilyrði tónlistarborgar, en misvel þó. Á sumum sviðum skarar borgin framúr og er jafnvel á heimsmælikvarða, en á öðrum vantar talsvert upp á að hlutirnir séu eins og best verður á kosið, líkt og var skýrt speglað í innleggi þátttakenda á vinnustofu tónlistarborgarinnar.

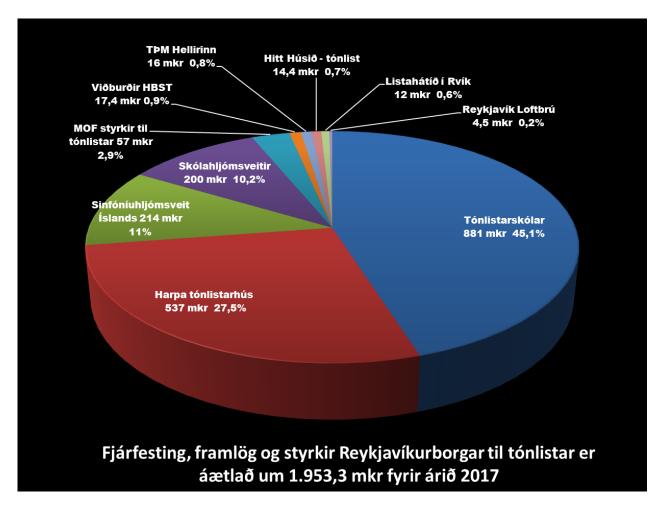
Styrkleikar tónlistarlífsins í Reykjavík teljast helstir:

- Rótgróin hefð fyrir tónlistarnámi barna
- Mikill fjöldi afkastamikils, skapandi og fjölhæfs tónlistarfólks
- Mikil þátttaka íslensks tónlistarfólks í alþjóðlegu tónlistarlífi
- Mikill áhugi almennings á tónlist og mikil tónleikaaðsókn í borginni
- Mikill áhugi erlendra gesta á íslensku tónlistarlífi
- Stórbætt aðstaða til tónlistarflutnings með tilkomu Hörpu tónlistarhúss

Það er því hægt að staðhæfa að auðlindin er fyrir hendi í Reykjavík. En til þess að nýta megi tækifærin til fullnustu þarf að leggja enn frekar áherslu á tvennt:

- Sérkenni og sérstöðu í íslenskri tónlist
- Innviði tónlistarlífsins. Þannig þarf að stilla saman strengina þannig að menntunin, tónlistariðnaðurinn og stoðkerfi tónlistarinnar sem eru innviðir tónlistarlífsins séu sterkir og í sama gæðaflokki og tónlistin sem ber hróður lands og þjóðar út um heiminn.

Reykjavíkurborg hefur undirstrikað mikilvægi tónlistarinnar s.s. með verulegum fjárfestingum í innviðum sem nýtast tónlistarlífinu og má þar helst telja Hörpu, styrkjum til tónlistarhátíða, í aðstöðu fyrir grasrót s.s. í TÞM. Framlög Reykjavíkurborgar árlega til tónlistarmenntunar nema rúmum milljarði á áætlun 2017.



Áætlun: Fjárfesting, framlög		
og styrkir Reykjavíkurborgar	mkr	%
Tónlistarskólar	881,0	45,1%
Harpa tónlistarhús	537,0	27,5%
Sinfóníuhljómsveit Íslands	214,0	11,0%
Skólahljómsveitir	200,0	10,2%
MOF styrkir til tónlistar	57,0	2,9%
Hátíðir HBST *	17,4	0,9%
TÞM Hellirinn **	16,0	0,8%
Hitt Húsið - tónlist	14,4	0,7%
Listahátíð í Rvík ***	12,0	0,6%
Reykjavík Loftbrú	4,5	0,2%
Samtals	1.953,3	100%

Samandregnar niðurstöður úr vinnustofu tónlistarborgarinnar og vinnu starfshóps leiða til eftirfarandi velgengnisþátta sem teljast grundvöllur fyrir Tónlistarborgina Reykjavík:

- Standa vörð um tónlistarmenntun og tónlistaruppeldi barna í borginni
- Örva og styðja betur við íslenskan tónlistariðnað og sprotafyrirtæki í tónlist
- Styrkja og samræma stuðningskerfi tónlistarlífsins, bæði opinbert og einkaframtak
- Auka þekkingu á umfangi tónlistargeirans

Tillögur starfshópsins endurspegla í grunninn þessa velgengnisþætti og hvernig megi virkja styrkleikana í Revkjavík sem best í beirra bágu.

# Ávinningur í tónlistarborg

Greina mögulegan ávinning af því að efla Reykjavík sem tónlistarborg, m.a. í formi starfa sem verða til í kringum tónlist og tónlistarhátíðir og fjölgunar ferðamanna.

Ljóst er að uppbygging öflugs tónlistariðnaðar í Reykjavík yrði mikil lyftistöng fyrir tónlistarsköpun og tónlistarlíf í borginni, en einnig á mun breiðari grunni atvinnulífsins, svo sem á vettvangi annarra skapandi greina. Samfélagsleg og menningarleg áhrif tónlistar hafa lengi verið þekkt en borgir víða um heim eru í auknum mæli að átta sig á áhrifum tónlistar á hagvöxt og atvinnusköpun, og má þar nefna Toronto í Kanada sem dæmi og markvissa og heildræna uppbyggingu tónlistarlífs og tónlistariðnaðar sem þar hefur átt sér stað undanfarin 6-7 ár og hefur skilað miklum árangri.

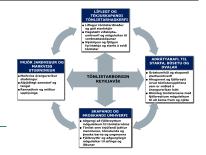
Líkt og áður hefur verið rakið skortir tilfinnanlega á gögn um vel flesta þætti íslensks tónlistarlífs. Einstakar og afmarkaðar rannsóknir hafa verið gerðar s.s. á efnahagslegum áhrifum tónlistarhátíða á borð við Iceland Airwaves og Secret Solstice:

- Erlendir gestir Iceland Airwaves árið 2016 voru um 6500 og skiluðu þeir tæpum 2 milljörðum í gjaldeyristekjum á meðan dvöl þeirra stóð.
- Erlendir gestir Secret Solstice hátíðarinnar 2016 voru tæplega 5000, og skiluðu þeir um 1.2 milljarði í gjaldeyristekjum á meðan dvöl þeirra stóð.

Einnig er hægt að leiða líkum að mikilvægi tónlistar þegar rýnt er í viðhorfs- og brottfararkannanir sem gerðar hafa verið á erlendum mörkuðum og á meðal erlendra ferðamanna sem hafa heimsótt borgina:

- Í könnun Ferðamálastofu sumarið 2016 nefndu tæplega 9% aðspurðra ferðamanna tónlist sem eina af ástæðum fyrir heimsókn.
- Í könnun Iceland Naturally sem framkvæmd var í Bandaríkjunum árið 2016 höfðu 76% aðspurðra áhuga á að fræðast meira um íslenska tónlist.

# 5. Heildartillögur að verkefnum Tónlistarborgarinnar byggðar á velgengnisþáttunum fjórum



# 5.1.Líflegt og tekjuskapandi tónlistarhagkerfi

### Óskastaðan

Í tónlistarborg er viðurkennt að tónlist er hreyfiafl sem eykur lífsgæði íbúa og gesta, hefur umtalsverð áhrif á hagkerfi borga, og snertir líf fólks í nærumhverfi þess en einnig um allan heim. Sterkur tónlistariðnaður og öflug sprotastarfsemi hefur mikil og jákvæð áhrif á hagvöxt borgarinnar og er forsenda þess að tónlistarlífið nái að blómstra til fulls.

# Mikilvægar áherslur til að ná markmiðum

- Líflegur tónlistariðnaður og góð starfskjör.
- Hagstætt viðskiptaumhverfi og möguleikar til verðmætasköpunar.
- Nýsköpun og fjölgun fyrirtækja og starfa á sviði tónlistar.

### Mikilvæg forgangsverkefni

#### Harpa tónlistarhús

 Tryggja rekstrarhæfi Hörpu sem miðstöð tónlistar í Reykjavík og auka þannig aðgang fjölbreyttrar tónlistar, tónlistartengdra viðburða og samræðuvettvangs, nýsköpunar og barnastarfs að húsinu.

### Öflugt tónlistarviðskiptaumhverfi

- Efla stoðir tónlistariðnaðarins í borginni með því að tengja betur saman tónlistarlífið og viðskiptahlutann m.a. með því að hvetja til samstarfs á milli tónlistarskóla, Listaháskólans og viðskiptadeilda í háskólum.
- Nýta betur þá þekkingu sem skapast hefur á viðskiptastjórnun tónlistarverkefna á borð við Of Monsters and Men, Kaleo, Glowie, Ásgeir Trausta o.fl. með það fyrir augum að styrkja viðskiptaumhverfi tónlistar í borginni.

#### Stuðningur við nýsköpun

- Styrkja tengsl tónlistariðnaðar og tónlistarfólks við nýsköpunargeirann m.a. með því að leiða saman Háskólana og fjármögnunaraðila, í samstarfi við nýsköpunarmiðstöð, um að koma á fót STARTUP MUSIC REYKJAVIK til að styðja og þróa nýsköpun og viðskiptaþróun í tónlistargeiranum.
- Hvetja til samtals og samvinnu sprota og nýsköpunaraðila með stuðningi Reykjavíkurborgar við aðstöðu í tónlistarklasa (sjá einnig lið 4 í 2. kafla).

### Tónlist sem atvinnuvegur

• Reykjavíkurborg leggur áherslu á að tónlist sé mikilsmetinn og tekjuskapandi starfsgrein með því að sýna fordæmi og hvetja til þess að tónlistarmenn og tónhöfundar fái laun fyrir vinnu sína

Dæmi um mælikvarða á árangur ofangreindra aðgerða:Verðmætasköpun, fjöldi fyrirtækja, fjöldi starfa

# 5.2. Aðdráttarafl til starfa, búsetu og dvalar

### Óskastaðan

Í tónlistarborg eru ótal tækifæri til tónleikahalds og fjölbreytt flóra tónleikastaða. Lifandi tónlist er sýnileg, vel kynnt og aðgengileg í borginni - á tónleikastöðum, opnum svæðum í borginni og í óhefðbundnari rýmum. Tónlistarmenn hafa tryggt húsnæði til að vinna að sköpun sinni, til að auka tengslanet sitt og vinna fjölbreytt verkefni í samstarfi við aðra. Í tónlistarborg hefur sköpun og flutningur tónlistar forgang og íbúar jafnt sem gestir njóta góðs af því.

## Mikilvægar áherslur til að ná markmiðum

- Gróskumikið og skapandi starfsumhverfi.
- Áhugavert og fjölbreytt úrval tónlistarupplifana sem er miðlað á árangursríkan hátt.
- Blómleg tónlistarsena með fjölbreyttum möguleikum til að koma fram og njóta.

# Mikilvæg forgangsverkefni

#### Fjölbreytt aðstaða til sköpunar og vinnu

- Stofnun klasa fyrir tónlistarstarfsemi þar sem t.d. væri hægt að fá aðgang að vinnu-, æfinga-,
  og upptökurými á viðráðanlegu leiguverði auk þess að tónlistartengd fyrirtæki hefðu aðstöðu,
  ráðgjafar/mentorar væru starfandi með stoðþjónustu o.fl. Lagt er til að horft verði til
  sambærilegra verkefna í öðrum tónlistarborgum, s.s. Chicago eða Toronto.
- Með því að styrkja aðila í sem flestum hverfum borgarinnar til að innrétta með fullnægjandi hætti og leigja út æfinga- og vinnurými á sanngjörnu verði fyrir tónlistarmenn. Þannig verði hvati fyrir eigendur á illa nýttum rýmum í borginni, t.d. fyrir iðnaðarhúsnæði í biðstöðu, til að skapa aðstöðu til tónlistaræfinga. Viðkomandi skuldbindi sig við styrkveitingu til að leigja út aðstöðuna í að lágmarki 2-3 ár.

#### Tónleikahald á opnum svæðum í borginni

- Með því að skilgreina svæði víða um borgina sem henta til tónlistarflutnings þar sem hægt er að koma fyrir færanlegum eða varanlegum sviðsbúnaði og aðgengi að rafmagni fyrir hljóðkerfi og búnað er tryggt fyrirfram.
- Tryggja aðgengi að fljótvirkri afgreiðslu leyfisveitinga innan borgarinnar. T.d. með því að skilgreindir verði fulltrúar Tónlistarborgar á umhverfis- og skipulagssviði borgarinnar sem þekkja öll þau atriði sem huga þarf að við leyfisveitingar fyrir lifandi tónlist og aðstoða tónlistarflytjendur og tónleikahaldara í ferlinu.

- Setja upp sumarsvið t.d. á Klambratúni þar sem haldir yrðu reglulegir, ókeypis tónleikar á sumrin.
- Auðvelda grasrót og nýliðum að halda og skipuleggja tónleika, t.d. með grasrótarsjóð fyrir tónleikaverkefni og með afnotum af einföldu hljóðkerfi og færanlegu sviði.

#### Stuðningur og einfaldað regluverk fyrir tónleikastaði

- Með því að kanna hvort hægt sé að minnka staðbundið kvaðir vegna hávaðamengunar í skipulagsskilmálum, t.d. við hluta af skilgreindum aðalgötum þar sem opnari heimildir eru fyrir rekstri veitingastaða og skemmtistaða en í öðrum götum.
- Færa ábyrgðina yfir á húsnæði í grennd að þau hljóðeinangri ef tónlistin hefur neikvæð áhrif. Þar sem tónleikastaður er fyrir verði það ábyrgð húsbyggjanda/-eigenda í nágrenninu að uppfylla kröfur um hljóðvist í sínum byggingum.
- Borgin sýni í verki að næturlíf, klúbbar og tónleikastaðir séu mikilvægir, t.d. með viðurkenningu fyrir tónleikastaði í borginni sem standa sig vel varðandi tónleikahald. Tónleikastaðir sem uppfylla ákveðin skilyrði fá sem dæmi aukna kynningu hjá kynningarmiðstöð ferðamanna, "rót-passann" (í samstarfi við bílastæðasjóð), tónlistarborgarlímmiða í glugga o.fl.

#### Kynning íslenskrar tónlistar

- Skilgreina íslenska tónlist og tónlistarviðburði sem kjarna í kynningu á Reykjavík
- Koma á virku samstarfi á milli Höfuðborgarstofu, ÚTÓNs, Íslandsstofu, Leifsstöð ofl. með kynningu íslenskrar tónlistar að markmiði.
- Aukið aðgengi ferðamanna og íbúa borgarinnar að tónlist í gegnum samvinnu upplýsingarmiðstöðvar ferðamanna, tónlistamanna og tónleikahaldara að stórbættu viðburðadagatali Visitreykjavik.is og sölu miða á menningarviðburði í gegnum þá síðu.

# 5.3. Skapandi og þroskandi umhverfi

# Óskastaðan

Í tónlistarborg er lögð höfuðáhersla á að veita öllum börnum aðgang að tónlistarmenntun og tækifærum til að iðka og njóta tónlistar. Tónlistarfræin leynast í öllum lögum samfélagsins og í tónlistarborg eru innviðir til staðar sem leyfa þeim að þroskast og dafna.

# Mikilvægar áherslur til að ná markmiðum

- Aðgengi að fjölbreyttum möguleikum til tónlistarnáms.
- Tónlist sem órjúfandi þáttur menntunar, tómstunda og þroska barna og ungmenna.
- Fjölbreyttir og aðgengilegir möguleikar til æfinga og iðkunar.

# Mikilvæg forgangsverkefni

#### Tónlistarnám í leik- og grunnskólum

- Tryggja að grunnskólar Reykjavíkur uppfylli ófrávíkjanlega skyldur sínar samkvæmt námsskrá þegar kemur að kennslu í listgreinum og hafi tækifæri til að þróa starf sitt og aðstöðu með tilliti til áherslu á listir og sköpun í starfinu.
- Efla söngstarf í leik- og grunnskólum m.a. með áherslu á kórastarf grunnskólum og faglegum stuðningi við leikskólakennara og leiðbeinendur.
- Leita markvisst leiða til að bregðast við skorti á tónlistar- og tónmenntakennurum í grunnskólum og bæta stöðuna m.a. með því að byggja upp spennandi starfstilboð þar sem bæði aðstaða og samsetning kennslunnar er byggð upp í samstarfi milli skólastjórnenda og kennara.

#### Skólahljómsveitir borgarinnar

- Bæta aðstöðu og hljóðfærakost skólahljómsveitanna með fjölbreytilegt starf að leiðarljósi.
- Skilgreina markmið og stefnu námsins, og kanna möguleika á að auka samspil í smærri hópum með auknu kennslumagni á hvern nemanda.
- Fjölgun nemenda í samræmi við fjölda barna í hverfum.

#### Aðstaða til tónlistariðkunar utan skólatíma

- Stórbætt aðstaða til fjölbreyttrar tónlistariðkunar á frístundaheimilum og félagsmiðstöðvum
- Vinna að framboði tónlistarnáms innan skóla og frístundaheimila til að bregðast við löngum biðlistum í tónlistarskóla í Reykjavík.
- Bjóða upp á sumarnámskeið og vinnustofur helgaðar tónlist fyrir börn og unglinga til að auka samfellu í tónlistariðkun og –námi.

#### Framboð tónlistarviðburða fyrir börn og með börnum

- Auka enn frekar framboð tónlistarviðburða fyrir börn og með börnum hjá menningarstofnunum Reykjavíkurborgar og aðilum sem Reykjavíkurborg styrkir í gegnum ákvæði um barnastarf í samningum.
- Bæta aðgengi barna og ungmenna að viðburðum í Hörpu og öðrum tónleikastöðum sem bjóða upp á tónleika fyrir börn og með börnum á skólatíma.
- Auka aðfengna tónlistarviðburði í skólum og leikskólum m.a. í gegnum aukna aðkomu Reyjavíkurborgar að verkefninu "List fyrir alla".

# 5.4. Frjór jarðvegur og markviss stuðningur

## Óskastaðan

Tónlistarlíf Reykjavíkur hefur um árabil einkennst af sköpunarkrafti, sköpunargleði, alþjóðlegum tengslum og samvinnu tónlistarmanna sem hér búa og starfa. Í tónlistarborg er stuðningur við þessa auðlind áþreifanlegur - hann einkennist af víðtækri samræmingu og samstarfi opinberra og einkaaðila, innanlands sem erlendis, ásamt viðamikilli þekkingu á tónlistarumhverfi borgarinnar. Þetta skilar sér í hvetjandi starfsumhverfi fyrir tónlistarmenn í öllum tónlistargeirum og á öllum stigum ferils síns.

# Mikilvægar áherslur til að ná markmiðum

- Markviss árangursríkur stuðningur.
- Alþjóðlegt samstarf og tengsl.
- Rannsóknir og miðlun upplýsinga.

# Mikilvæg forgangsverkefni

#### Farvegur til framkvæmda

Verkefnastjóri sem gegnir ráðgjafa- og samhæfingarhlutverki í tónlistarlífi borgarinnar fjöltengið fyrir greinina í borginni. Sinnir einnig upplýsingaöflun, greiningarvinnu, aðstoð,
ráðgjöf og alþjóðlegu samstarfi. Verkefnastjóri hefur aðstöðu hjá ÚTÓN og starfar í náinni
samvinnu við þau ásamt sérstöku 3ja manna ráðgjafateymi Tónlistarborgarinnar Reykjavík
sem fylgi verkefninu eftir.

#### Öflugt og markvisst styrkjakerfi til stuðnings tónlistarlífsins

• Markviss samhæfing styrkjaframboðs hjá ríki, borg og öðrum sem styðja við íslenskt tónlistarlíf fyrir tilstuðlan verkefnisstjóra Tónlistarborgar, þar sem upplýsingaflæði og samtal er um markmið og nálgun.

#### Sérstaða og saga tónlistar í borginni

- Skilgreina íslenska tónlist sem einn af frumkröftum Reykjavíkur .
- Tónlistarsaga og einkenni tónlistar í borginni dregin fram og gerð aðgengileg almenningi ,
   t.d. með sýningu sem gæti átt heima í Hörpu, eða í öðru viðeigandi húsnæði.
- Hvetja háskólaumhverfið til greiningar á sögu og einkennum tónlistar í borginni, í samstarfi við aðila sem myndu standa að sýningu um tónlistarsögu og tónlistarlíf borgarinnar.

#### Kortlagning tónlistarlífsins

 Tryggja að opinberir aðilar sinni markvissri kortlagningu, upplýsingaöflun og greiningu á öllum helstu lykilþáttum sem lúta að tónlistargeiranum og stuðla þannig að því að litið sé á tónlist sem mikilvæga starfsgrein.

#### Alþjóðlegt samstarf

 Virk þátttaka í samstarfi tónlistarborga, m.a. með sameiginlegum þekkingarviðburðum, tónlistarhátíðum, listamannadvöl og gagnkvæmu kynningarstarfi.



5/29/2017

# Tónlistarborgin Reykjavík

Fylgiskjöl við tillögur starfshóps



Menningar- og ferðamálasvið Reykjavíkurborgar. Fylgiskjöl við skilagrein.

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# ERINDISBRÉF

#### Starfshópur um tónlistarborgina Reykjavík

#### Ábyrgðarmaður:

Borgarstjórinn í Reykjavík.

Inngangur:

Tónlistarborg byggir á líflegum tónlistariðnaði og tónlistarhagkerfi. Tónlistarborg getur skilað miklum hagrænum, félagslegum og menningarlegum ávinningi auk þess að skapa fjölda starfa. Tónlistarborg er einnig til þess fallin að draga að ungt fólk og tæknifyrirtæki. Í Reykjavík er þegar til staðar blómleg tónlistarsena, gott aðgengi að rýmum og tónleikastöðum auk þess sem í borginni er að finna tónlistarhátíðir, útgáfufyrirtæki og frjósamt umhverfi fyrir gott tónlistarlíf.

#### Hlutverk starfshóps:

Að móta tillögur um tónlistarborgina Reykjavík og áætlun um framfylgd þeirra í samráði við hagsmunaaðila í tónlistarlífinu.

#### Helstu verkefni:

- Að safna upplýsingum um hvað þarf að vera til staðar í tónlistarborg og greina að hvaða marki Reykjavík uppfyllir þær kröfur.
- Greina mögulegan ávinning að því að efla Reykjavík sem tónlistarborg, m.a. í formi starfa sem verða til í kringum tónlist og tónlistarhátíðir og fjölgunar ferðamanna.
- Að kanna kosti og helstu leiðir sem líklegar eru til að efla Reykjavík sem tónlistarborg.
- Að gera tillögur um aðkomu og stuðning Reykjavíkurborgar við tónlistarborgina Reykjavík og einnig hvernig ríkisvaldið geti stutt við tónlistarborgina.
- Kostnaðarmat á tillögum.

Starfshópurinn hafi skýrsluna Mastering a Music City og Seattle Music City og 7 lykilstefnur fyrir tónlistarborgir til hliðsjónar í störfum sínum en þær eru:

- 1. Tónlist og tónlistarvænar reglugerðir (Music and musician-friendly policies), m.a.;
  - Regluverk er tengist tónleikahaldi (m.a. opnunartímar, áfengisleyfi, bílastæðamál).
  - Skipulagsmál (m.a. deiliskipulag).
  - · Aðgengi að leiguhúsnæði á viðráðanlegu verði.
  - Mikilvægast er að skapa stuðningsríkt umhverfi sem styður tónlistarfólk í að geta einbeitt sér að því sem það gerir best skapa og flytja tónlist.
- 2. Tónlistarskrifstofa (Music Offices);
  - Tengiliður við alla hagsmunaaðila (tónlistarfólk, hagsmunasamtök, opinberar stofnanir osfrv).
  - Leiðir tónlistartengd stefnumál og sér um úrlausn ágreiningsmála.
  - Reynsla tónlistarborga hefur sýnt að þær borgir sem eru með svokallað "single point of contact" fyrir tónlistarsamfélagið eru með skilvirkari stefnu og gengur betur í að koma stefnumálum í verk.
- 3. Tónlistarráðgjafanefnd (Music Advisory Boards);
  - Tenging á milli tónlistariðnaðarins og borgarinnar.
  - · Nefnd þar sem saman koma fulltrúar úr tónlistargeiranum en einnig

- sérfræðingar úr tengdum geirum, svo sem ferðamálaiðnaðinum.
- Nefndin fer yfir mál er tengjast tónlistariðnaðinum og vinnur að því að koma á samstöðu í mikilvægum málum.
- 4. Samfélagsþátttaka(Engaging the broader community);
  - Þátttaka/aðkoma sem flestra sem verkefnið hefur áhrif á.
  - Tónlistariðnaðurinn samanstendur af mörgum litlum og meðalstórum fyrirtækjum auk einstaklinga sem starfa einnig í öðrum geirum.
- 5. Aðgengi að menntun, rýmum og tónleikastöðum (Access to spaces and places);
  - Grundvallaratriði fyrir tónlistarborgir er að framboð af æfinga- og vinnurýmum auk tónleikastaða í mismunandi stærðarflokkum sé nægilegt.
  - Aðgengi að tónlistarmenntun.
- 6. Áhorfendaþróun (Audience development);
  - Framboð af mismunandi tónlistarviðburðum.
  - Opnir tónlistarviðburðir eða viðburðir á viðráðanlegu verði fyrir yngri aldushópa til að kynna fyrir þeim mismunandi tónlistarstefnur. Markmiðið er að ala upp betri hlustendur.
- 7. Tónlistarferðamennska
  - Ahersla á fjölbreytt framboð tónlistartengdra viðburða sem laða ferðamenn til borgarinnar. Sem dæmi má nefna tónlistarhátíðir (Iceland Airwaves og Jazzhátíð Reykjavíkur, myrkir musikdagar o.fl.

#### Starfshópinn skipa:

Svanhildur Konráðsdóttir, menningar- og ferðamálasviði (formaður).

Hildur Gunnlaugsdóttir, umhverfis- og skipulagssviði.

Bjarni Daníelsson, skrifstofu eigna og atvinnuþróunar.

Sigtryggur Baldursson, ÚTÓN.

Bryndís Jónatansdóttir, ÚTÓN.

#### Starfsmenn:

Signý Pálsdóttir, menningar- og ferðamálasviði.

#### Til ráðgjafar og samstarfs:

Starfshópurinn hafi samráð við tónlistargeirann, þ.e. tónlistarfólk, eigendur tónleikastaða, upptökustjóra, hagsmunasamtök og aðra hagsmunaaðila. Þá leiti starfshópurinn ráðgjafar innan og utan borgarkerfis hjá aðilum með sérþekkingu á viðfangsefninu.

#### Starfstímabil:

Starfshópurinn skili niðurstöðum til ábyrgðarmanns fyrir lok febrúar 2017.

Reykjavík, 9. desember 2016

Dagur B. Eggertsson

#### Fylgiskjal 6.2. Skipulag samráðsfundar og þátttaka 8.2.2017

# Reykjavík – Tónlistarborg Vinnufundur í Rímu – Hörpu 8.febrúar, milli kl 13 og 17

#### Starfshópur Tónlistarborgar:

Svanhildur Konráðsdóttir Bryndís Jónatansdóttir Hildur Gunnlaugsdóttir Jakob Frímann Magnússon Óli Örn Eiríksson Sigtryggur Baldursson Starfsmenn: Signý Pálsdóttir, Sólrún Sumarliðadóttir

Fundarstjórn: Bjarni Snæbjörn Jónsson

#### Hópstjórar:

- 1. Tónlistarmenntun og tónlistaruppeldi Kristín Valsdóttir
- 2. Tónleikastaðir og vinnurými Sólrún Sumarliðadóttir
- 3. Stoðkerfi og styrkir Bryndís Jónatansdóttir
- 4. Viðskiptaumgjörð og tónlistariðnaðurinn Jakob Frímann Magnússon
- 5. Reglugerðir, skipulagsmál, og umgjörð um tónlistarlífið Hildur Gunnlaugsdóttir
- 6. Markaðssetning og tónlistarferðamennska Sigtryggur Baldursson
- 7. Tónlistarhátíðir og viðburðir Signý Pálsdóttir
- 8. opinn flokkur Svanhildur Konráðsdóttir

Boð var sent til um 160 fulltrúa úr tónlistarlífinu Svör bárust frá um 105. 74 staðfestu komu 62 mættu, auk starfshóps og fundarstjóra

Þátttakendur á vinnufundi voru alls 71 (með fundarstjóra og meðlimum starfshóps). Þar af voru 37 konur og 34 karlar.

#### Fylgiskjal 6.2. Skipulag samráðsfundar og þátttaka 8.2.2017

#### Skráðir þátttakendur (aðrir en starfshópur og fundarstjóri):

Addý Ólafsdóttir

Anna Sigurbjörnsdóttir Árni Matthíasson

Ása Hauksdóttir

Áshildur Bragadóttir Áslaug Friðriksdóttir

Ásmundur Jónsson

Benedikt Reynisson Berglind Tómasdóttir (Bjarni Jónsson- forföll)

Björg Jónsdóttir Björn Kristjánsson

Björn Th. Árnason Björn Thoroddsen

(Böðvar E. Guðjónsson- forföll) Pétur Þór Benediktsson

(Bragi Valdimar Skúlason -

forföll)

(Kjartan Guðbergsson- forföll)

Dagur B. Eggertsson (Egill Ástráðsson- forföll)

Einar Bárðarson

Einar Örn Benediktsson

Eldar Ástbórsson Elfa Lilja Gísladóttir

(Elísabet Indra Ragnarsdóttir-

forföll)

Elsa Yeoman

Eva Einarsdóttir Freyja Gunnlaugsdóttir

Grímur Atlason

Guðmundur Birgir Halldórsson

Guðrún Björk Bjarnadóttir

Guðvarður Gíslason

Gunnar Guðbjörnsson

Gunnar Guðmundsson

Gunnar Karel Másson

(Halldór Bragason- forföll)

Hallveig Rúnarsdóttir

Harpa Rut Hilmarsdóttir

Haukur Gröndal

(Inga Rós Ingólfsdóttir- forföll)

Ingibjörg Elsa Turchi

Ingvar Geirsson

Ísleifur B. Þórhallsson

Jón Mýrdal

Kári Sturluson

Karitas Kjartansdóttir

Kjartan Ólafsson

Kolbrún Halldórsdóttir

Kristín Valsdóttir

Kristjana Rós Guðjohnsen (Lára Rúnarsdóttir- forföll)

Lárus Jóhannesson

(Leifur Björnsson- forföll) Logi Pedro Stefánsson

Lucy Hill

Margrét Arnardóttir Margrét Norðdahl Margrét Ragnarsdóttir

María Huld Markan Sigfúsdóttir (María Rut Reynisdóttir- forföll)

Melkorka Ólafsdóttir

(Ólafur Páll Torfason- forföll)

Ragnheiður Jóna Jónsdóttir

S. Björn Blöndal

Samúel Jón Samúelsson Sigfríður Björnsdóttir Sindri Ástmarsson

Steinunn Birna Ragnarsdóttir Sunna Gunnlaugsdóttir Sveinbjörg Birna Sveinbjörnsdóttir

Arnheiður Vala Magnúsdóttir

Þórgnýr Thoroddsen Þórir Jóhannsson

Þórunn Gréta Sigurðardóttir

# HELSTU ÁHERSLUR FRÁ SAMRÁÐSFUNDI:

#### TÓNLISTARMENNTUN OG TÓNLISTARUPPELDI:

- bæta aðstöðu og tækifæri til tónlistariðkunar í grunnskólum og frístund, og í sumarfríum
- bæta aðgengi að tónlistarnámi og óháð efnahag, uppruna, fötlun og öðru sem getur talist til hindrana.
- auka tengingu grunnskóla og tónlistarnáms
- auka aðgengi barna og ungmenna að tónleikum, í Hörpu og annars staðar.
- bæta kjör og fjölga tónlistarkennurum
- auka samvinnu milli grunnskóla, leikskóla, tónlistarskóla og annarra menntastofnana þegar að tónlistarnámi kemur
- auka áherslu í framhaldsnámi tónlistar á greinar sem tengjast tónlistariðnaði, viðskiptahliðinni og því að koma sér á framfæri
- efla LHÍ greiða úr húsnæðisvanda og efla framboð og aðstöðu tæknináms

#### TÓNLEIKAHALD OG VINNUAÐSTAÐA

- leysa úr miklum vinnuaðstöðuvanda tónlistarmanna í borginni
- standa vörð um og efla fjölbreytilega tónleikastaði í borginni
- leysa úr fasteignavanda Hörpu
- auka tónlistarflutning og sýnileika tónlistar í borgarlandinu
- bæta og gera aðgengilegri aðstöðu til tónlistarflutnings á opnum svæðum í borginni
- Skýra ábyrgð á stefgjöldum vegna tónleikahalds
- tryggja rekstargrundvöll tónlistarhátíða með langtíma fjármögnun

#### STARFSUMHVERFI OG STOÐKERFI

- stuðla að því að tónlistarmenn fái greitt fyrir vinnu sína sky töxtum
- bæta aðstöðu og tækifæri til tónleikahalds of erfitt og dýrt fyrir tónlistarfólk að halda tónleika
- auka stuðning við grasrótina
- byggja upp góða aðstöðu til æfinga og upptöku, en mikill skortur er í borginni á vinnuaðstöðu fyrir tónlistarmenn.
- Stofna tónlistarskrifstofu í Reykavík sem styður við og tengir helstu aðila tónlistarlífsins
- auka samstarf og samræmingu á stuðningi við tónlistarlífið
- stofna tónlistarklasa í ætt við sjávarklasann þar sem tónlistartengd fyrirtæki og tónlistarmenn geta starfað hlið við hlið
- opna leið tónlistariðnaðar og tónlistarmanna inn í nýsköpunarsjóði og efla sprotastarfsemi
- stórbæta rannsóknir á tónlistarlífi og bæta miðlun á talnaefni um tónlistarlífið

#### MARKAÐSSETNING, NÝSKÖPUN OG VIÐSKIPTAUMHVERFI

- Skilgreina tónlist sem einn af frumkröftum borgarinnar
- auka fjármagn til ímyndarsköpunar og markaðssetningar á Reykjavík sem tónlistarborg
- auka áherslu á tónlistarsögu og sérstöðu borgarinnar hvað varðar tónlist, með nútónlistarsafni til dæmis
- auka samvinnu við ferðaþjónustufyriræki um miðlun tónlistar og tónlistarviðburða til ferðamanna
- Efla viðburðadagatal í samvinnu við tónlistarmenn og tónleikahaldara og tengja beint miðasölu
- skapa öflugri tengingar við tónlistarborgir erlendis, t.d. í formi "vinatónlistarborga"
- Auka stuðning við ÚTÓN
- opna leið tónlistariðnaðar og tónlistarmanna inn í nýsköpunarsjóði og efla sprotastarfsemi

# Yfirlit um tónlistarnám frá SFS

Greinargerð Sigfríðar Björnsdóttur deildarstjóra listfræðslu á Skóla- og frístundasviði byggð á tillögum starfshóps um Tónlistarborgina Reykjavík (3. Skapandi og þroskandi umhverfi) og hugmyndavinnu á SFS

# **Yfirlit**

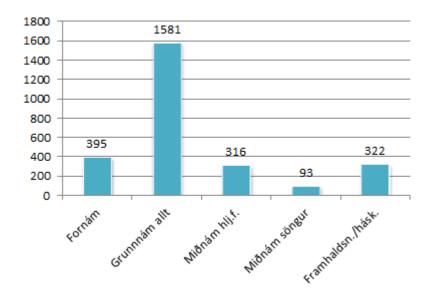
Yfirlit yfir umfang og dreifingu námstækifæra á sviði tónlistar sem styrkt er af Reykjavíkurborg og örfáar hugmyndir að aðgerðum út frá tillögum starfshóps

#### Um tónlistarnám

Tónlistarnám í tónlistarskólum í Reykjavík sem njóta stuðnings á grundvelli samninga við borgina fer fram í 18 tónlistarskólum og er heildarfjöldi nemenda sem falla undir slíka samninga 2707. Þar af stunda nám á efri stigum um 415 nemendur og fer það nám fram með stuðningi úr Jöfnunarsjóði sveitarfélaga. Alls stunda 289 nemendur tónlistarnám í Reykjavík sem eiga lögheimili utan borgarinnar, þar af 110 á neðri stigum, en þeir eru allir inni í þessum tölum. Rétt er að taka fram að tónlistarnemendur sem hér um ræðir eru á öllum aldri.

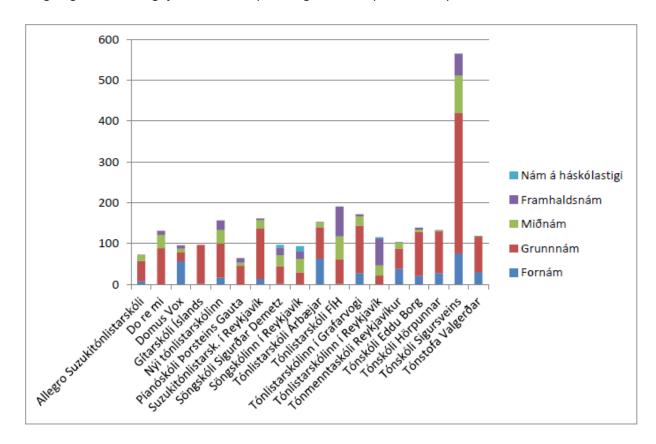
Reykjavíkurborg rekur tónlistarskóla fyrir 34 nemendaígildi við Grunnskólann Klébergi. Skólahljómsveitir á vegum borgarinnar eru fjórar og munu frá hausti hafa 480 nemendur í námi. Alls stunda því 2694 nemendur formlegt tónlistarnám með stuðningi borgarinnar og eru þá nemendur sem stunda nám með stuðningi frá Jöfnunarsjóði ekki meðtaldir né heldur þeir nemendur á neðri stigum sem eiga lögheimili utan Reykjavíkur, enda fái skólar stuðning vegna þeirra frá viðkomandi sveitarfélögum. Yfirlit yfir starfsemi skólahljómsveita er að finna í sérstöku yfirliti.

Tónlistarnemendur í tónlistarskólum í borginni skiptast þannig eftir námsstigum:



Hér fyrir neðan eru nokkur sjónarhorn sem vert er að skoða með tilliti til vandlega ígrundaðra skrefa vegna umbóta á sviði tónlistarnáms í borginni.

Dreifing nemenda milli tónlistarskóla, aldurshópa og hverfa eru allt sjónarhorn sem vert er að skoða. Hér má til dæmis sjá hvernig nemendur dreifast á tónlistarskóla og milli námsstiga. Skólarnir eru margir og ólíkir, eins og sjá má af stærð þeirra og hve litaskiptin í súlum þeirra eru ólík.



En tónlistarskólarnir kenna nemendum úr öllum hverfum borgarinnar og þeir eru á ýmsum aldri. Á næstu mynd má sjá hvernig heildarfjöldi tónlistarnemenda í tónlistarskólum og svo skólahljómsveitum er mishátt hlutfall af mannfjölda í hverfunum á aldrinum 2-18 ára.

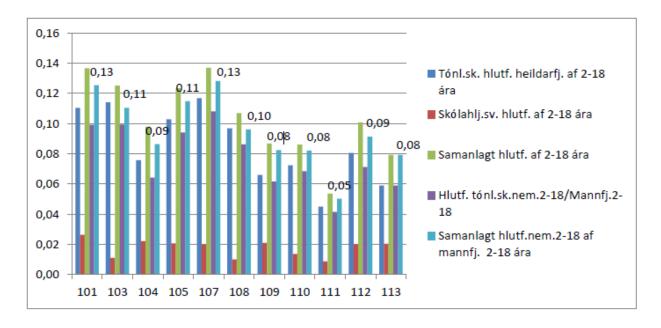
Fyrstu þrjár súlur frá vinstri í hverju póstnúmeri sýna hlutfall heildarfjölda nemenda í báðum gerðum tónlistarnáms af heildarmannfjölda 2-18 ára í hverfinu.

Seinni súlurnar tvær fyrir hvert póstnúmer sýna hvert hlutfallið er þegar aðeins er miðað við þá tónlistarnemendur sem eru á þeim aldri líka.

Tölurnar inni í myndinni eiga við síðustu súluna sem sýnir samanlagt hlutfall 2-18 ára nemenda í tónlistarskólum/skólahljómsveitum af mannfjölda á sama aldri í hverfinu. Um er að ræða þátttöku í tónlistarnámi á bilinu 5-13% eftir póstnúmerum í þessum aldurshópi.

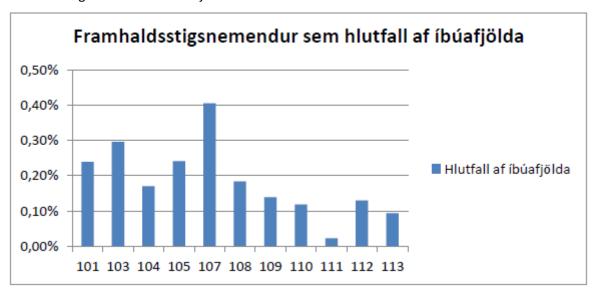
Hverfi 111 sker sig verulega úr og er þátttaka þar langlægst. Tónlistarnámsþátttaka er hlutfallslega mest í hverfum 107 og 101 í þessum aldurshópi. Biðlistar eru í tónlistarnám í hverfi 111 og því er áhugaleysi ekki skýring á þessu. Ekki hefur verið hægt að mæta vaxandi áhuga á tónlistarnámi í hverfinu og á það ekki síst við um áhuga á þátttöku í skólahljómsveitarstarfi.

Fylgiskjal 6.4.1. Yfirlit um tónlistarnám frá Skóla- og frístundasviði Reykjavíkurborgar



Að meðaltali er tónlistarnámsþátttaka í hverfum í borginni um 10% í þessum aldurshópi. Ekki er í þessum tölum teknir með nemendur í hverfi 116 þar sem aðstæður eru þar mjög sérstakar.

Í ljósi þessara talna kemur því ekki óvart hvernig mynd það gefur að skoða hlutfall nemenda á framhaldsstigi miðað við heildarfjölda íbúa í hverfum.



Aldursdreifing í hverfum hefur að sjálfsögðu áhrif á þessa mynd en almennar línur eru skýrar og ljóst að misdreifing nýtingar tónlistarnámstækifæra speglast í bæði heildarfjöldasýn og þegar skoðað er hlutfall þeirra sem ná lengst í náminu miðað við mannfjölda.

Í ljósi þess hve rannsóknir sýna ótvírætt jákvæð áhrif tónlistarnáms á hvern nemanda þá er misdreifing þessara gæða illverjanleg. Ekki er það síst í ljósi þess að biðlistar eru í tónlistarnám í viðkvæmasta hverfinu, bæði hjá skólahljómsveitum og tónlistarskólum. Eitt af forgangsatriðum í endurskoðun tónlistarmenntunar í borginni hlýtur að vera stórátak á þessum vettvangi.

# Örfáar hugmyndir að aðgerðum - brot af draumsýn

#### Tónlistarnám í leik- og grunnskólum

Tryggja að grunnskólar Reykjavíkur uppfylli ófrávíkjanlega skyldur sínar samkvæmt námsskrá þegar kemur að kennslu í listgreinum og hafi tækifæri til að þróa starf sitt og aðstöðu með tilliti til áherslu á listir og sköpun í starfinu

- styðja stjórnendur skóla við að byggja upp tilboð á sviði lista og bjóða listafólki til samstarfs í mun meira mæli en gert hefur verið
- bæta búnað og auka efniskaup og leita til barna og unglinga hvers skóla við forgangsröðun
- stórauka möguleika á stuðning við þróunarverkefni á sviði listgreina og stuðningi við listtengda viðburði barna s.s. í tengslum við Barnamenningarhátíð

Efla söngstarf í leik- og grunnskólum m.a. með áherslu á kórastarf grunnskólum og faglegum stuðningi við leikskólakennara og leiðbeinendur

- setja af stað kórstarf í völdum skólum þar sem stjórnendur hafa mikinn áhuga og skoða með hvaða hætti er hægt að festa slíkt í sessi þrátt fyrir skort á tónmenntakennurum s.s. með vel menntuðu söngfólki
- setja sönghæfni sem viðmið við ráðningu ófaglærðs starfsfólks í leikskólum sem gæti það fengið metið til launa ef það tæki að sér söngstarf með börnunum

Leita markvisst leiða til að bregðast við skorti á tónlistar- og tónmenntakennurum í grunnskólum og bæta stöðuna m.a. með því að byggja upp spennandi starfstilboð þar sem bæði aðstaða og samsetning kennslunnar er byggð upp í samstarfi milli skólastjórnenda og kennara

- með því að byggja upp tónlistarkennsluteymi í hverfum þar sem nokkrir tónlistarmenn eru ráðnir hjá hverfinu til að fara á milli – einir eða saman eftir verkefnum – og bæði kenna, styðja við og taka þátt í tónlistarstarfi barna og ungmenna
- með því að skoða möguleika á námsstyrkjum til framúrskarandi, reykvískra tónlistarnemenda sem velja að fara í tónlistarkennaranám / tónmenntakennaranám við íslenska háskóla
- með því að skoða reynsluna sem byggst hefur t.d. upp í Fellaskóla af kennslu og tilboðum Tóneyjar og nýta hana við uppbyggingu nýrra tilboða
- með því að fara í samtal við háskólasamfélagið um menntun listgreinakennara og byggja úrræði til fjölgunar listgreinakennara m.a. á rannsóknum sem liggja fyrir

- með því að fara í öflugt og lifandi samstarf við tónlistarmenn í listkennsludeild
   LHÍ
- með því að muna að engin ein leið mun bæta ástandið

#### Skólahljómsveitir borgarinnar

#### Skilgreina markmið og stefnu tónlistarnáms í skólahljómsveitum Reykjavíkurborgar

 vinna þarf starfskrá, stefnu og viðmið um gæði í starfinu með starfsfólki, nemendur og foreldrum

#### Bæta aðstöðu og hljóðfærakost skólahljómsveitanna með fjölbreytilegt starf að leiðarljósi

- hljóðfærakostur er að úreldast hratt og endurskoða þarf fjármögnun hans og rétta við stöðuna með inngripi
- aðstaða skólahljómsveita í Reykjavík er mjög mismunandi. Reykjavíkurborg verður að grípa tækifæri sem gefast þegar kemur að nýbyggingum eða endurnýjun húsnæðis og byggja stórhuga upp sambærilega aðstöðu og þekkist í nágrannasveitarfélögum. Dæmi er þegar kemur að uppbyggingu í Breiðholtsskóla, en þá væri tækifæri til að koma upp aðstöðu sem myndi gjörbreyta möguleikum í hverfinu.
- kanna möguleika á að auka samspili í smærri hópum með auknu kennslumagni á hvern nemanda og auka þannig fjölbreytni í tónlistariðkun á vettvangi sveitanna

#### Fjölgun nemenda í samræmi við fjölda barna í hverfum

• sbr. yfirlit yfir tónlistarnám fremst í greinargerð

#### Aðstaða til tónlistariðkunar utan skólatíma

#### Stórbætt aðstaða til fjölbreyttrar tónlistariðkunar á frístundaheimilum og félagsmiðstöðvum

- styðja enn frekar við öflugt samstarf félagsmiðstöðva við tónlistarfólk og hljómsveitir
- byggja upp aðstöðu og skapa sérþekkingu í félagsmiðstöðvum
- sjá Brot úr mögulegri framtíðarsýn fyrir neðan ómæld tækifæri

# Vinna að framboði tónlistarnáms innan skóla og frístundaheimila til að bregðast við löngum biðlistum í tónlistarskóla í Reykjavík

- setja af stað þróunarverkefnið í tónlistarkennslu á grundvelli lýðræðislegrar nálgunar sem kynnt var á ráðstefnu um frístundastarfið í HÍ haustið 2016
- sjá Brot úr mögulegri framtíðarsýn fyrir neðan ómæld tækifæri

Bjóða upp á sumarnámskeið og vinnustofur helgaðar tónlist fyrir börn og unglinga til að auka samfellu í tónlistariðkun og –nám

• til dæmis með því að bjóða nemum í tónlistarkennslu eða á framhaldsstigi í tónlistarnámi örugga sumarvinnu sem jafnvel mætti meta við háskólana

#### Framboð tónlistarviðburða fyrir börn og með börnum

Auka enn frekar framboð tónlistarviðburða fyrir börn og með börnum hjá menningarstofnunum Reykjavíkurborgar og aðilum sem Reykjavíkurborg styrkir í gegnum ákvæði um barnastarf í samningum

 Sá mikli áhugi og kraftur sem margir tónlistarmenn og tónlistarhópar hafa sýnt í starfi fyrir börn og með börnum ætti að vera þeim til tekna þegar kemur á umsóknum um styrki eða samstarfssamninga.

Bæta aðgengi barna og ungmenna að viðburðum í Hörpu og öðrum tónleikastöðum sem bjóða upp á tónleika fyrir börn á skólatíma og auka möguleika á að nýta slíka staði með börnum sem flytjendum

- leysa verður vanda þeirra barnahópa sem erfitt eiga með að sækja viðburði vegna fjarlægðar s.s. með útboði um hópbílaakstur með þetta viðfangsefni í huga
- semja verður um sérstaka verðskrá í kirkjum, söfnum og tónleikahúsum þegar kemur að viðburðum þar sem börn eru flytjendur

Auka aðfengna tónlistarviðburði í skólum og leikskólum m.a. í gegnum aukna aðkomu Reykjavíkurborgar að verkefninu "List fyrir alla"

 "List fyrir alla" er mikilvægt verkefni og þátttaka í Reykjavík skiptir líka listamennina miklu máli. Skapa þarf möguleika til að kaupa inn slíka viðburði og mögulega væri best að hafa miðlægan pott sem hægt væri að sækja í frá þeim skólum sem vildu taka þátt

# Eftir 5 ár - Brot úr mögulegri framtíðarsýn:

Punktar teknir saman 2015 - undirpunktar unnir 2017

#### Viðamikið samstarf tónlistarskóla og grunnskóla, grenndarsamfélags auk menningarstofnana

Styðja þarf sérstaklega við þær stofnanir sem þegar hafa þróað slík verkefni. Dæmi eru leikskólaverkefni Tónskóla Sigursveins á barnamenningarhátíð. Einhver umbun þarf að búa í kerfinu – en af tvennu eru þó tækifæri mikilvægari. Þannig eru styrkir til þróunarverkefna mjög mikilvægir og þyrfti að efla.

#### Öll börn hafa stundað tónlistarnám í 2 ár fyrir 14 ára aldur

• Spennandi væri að nálgast þetta á opnum grunni þar sem stutt væri við formlegt sjálfsnám nemenda og lýðræðisleg vinnubrögð þar sem yngri nemendur fengju markvissa kynningu á nokkrum hljóðfærum að eigin vali og reynslu í t.d. 1 ár og síðan markvisst nám á hljóðfæri að eigin vali í 1 ár. Eldri nemendur hefði ekki misst af lestinni heldur myndi þeim bjóðast hópnám í þeim anda sem þróaður hefur verið helst í Tónlistarskóla Árbæjar – t.d. hljómborðsnámskeiðin.

# Öll börn frá 10-16 ára hafa aðgang að vandaðri aðstöðu til tónlistaræfinga og upptöku á samstarfsvettvangi skóla og frístundar

• Einfaldar lausnir s.s. gámar sem innréttaðir eru sem tónlistaræfingarými með öllum hljóðfærum og upptökutækjum sem á þarf að halda eru notaðar t.d. í Óðinsvéum. Ef mönnum hugnast betur annað þá er fyrir hendi áhugi og húsnæði í Frístundamiðstöðinni í Miðbergi í Breiðholti - og mætti byggja þar og hugsanlega einum öðrum stað í bænum sérstaka aðstöðu til upptöku og hljóðvinnu fyrir hljómsveitir ungmenna. Æfingahúsnæði vantar fyrir hljómsveitir. Hugsanlega mætti skoða samstarf við tónlistarskóla um að bjóða upp á slíkt í þeirra húsnæði – það væri ódýrara að hjálpast að með búnað og launakostnað starfsmanna heldur en að reisa slíkt frá grunni. Til þess þyrftu þó viðkomandi tónlistarskólafulltrúar að gangast inn á hugmyndafræði sjálfræðis og lýðræðis líkt og tíðkast í frístundastarfi með ungmennum í Reykjavík. Fagmenntaðir aðilar/reyndir aðilar til að aðstoða ungmennin væri örugglega farsælt.

#### Sjálfsnám barna í tónlist og hliðargreinum hennar hefur aukist til muna

• Stjórnandi Tónlistarskóla Árbæjar hefur þróað umhverfi fyrir "flippaða" hljóðfærakennslu og veflægan stuðning við sjálfsnám í tónfræðum. Koma þarf þessum tilboðum og stuðningi með þeim formlega inn í skólana og styðja ungmenni sem vilja taka slíkt nám t.d. sem val í efri bekkjum. Mat á frammistöðunni gæti verið samstarfsverkefni tónlistarskólans og grunnskólans. Nemendur ættu líka að geta tekið slíkt sem hluta af tómstundum sínum. Sjá umræðu ofar um sjálfsnám og mat á því.

#### Íslensk vefsvæði hafa styrkst sem opnar leiðir fyrir nemendur á öllum aldri

• Hér er vísað til Tónlistarskóla Árbæjar – en stjórnandinn er þegar þetta er skrifað að þjálfa kennara nýs menntaskóla í tónlist í skipulag fjaráfanga og vefstudds náms.

#### Mat á sjálfsnámi hefur verið sett í farveg

- Allt mat á því sem ungmenni eru að gera "utan" grunnskólans er í molum. Ungmenni eiga að geta sjálf mótað hvað þau ætla að gera og hvernig þau vilja að það sé metið hvort heldur í grunnskóla eða framhaldsskóla. Sjálfsnám er jafn mikil staðreynd eins og deilihagkerfið, en skólakerfið fylgir ekki með og nýtir ekki möguleikana.
- Það að nemandi fær einingar í framhaldsskóla fyrir að sækja áfanga í t.d. ljósmyndun, sem þar eru boðnir á byrjendastigi, en fær ekki einingar fyrir tónlistarskólanám á neðri stigum eða

- t.d. fyrir verkefni sem hann vinnur sem þátttakandi í veflægu námskeiði eða vefsamfélagi og getur skilað portfoliu/verkefni og skýringum með þeim er tímaskekkja.
- Það sem þarf að opna fyrir og gerist einhvern tíma er að nemandi kemur sjálfur með tillögu að verkefni sem hann sækir að fá samþykkt sem val eða til eininga og vinnur það síðan. Mörg slík skref skapa viðkomandi persónulega nálgun og hæfni sem enginn annar hefur í sömu samsetningu eða byggða eins upp.
- Þessi hugsun snertir tónlistarnám beint því þar liggja ótrúleg tækifæri til að opna á mótun verkefna og framvindu þeirra hjá nemendum sjálfum. Fyrir hendi eru þegar samstarfsaðilar sem hægt væri að stíga fyrstu skrefin með hvað tónlist varðar.

# Tónlistarskólar og grunnskólar leggja börnum til hljóðfæri, hvort heldur í tímabundnu sjálfsnámi eða kerfisbundnu tónlistarnámi

• Borgin ætti að eiga hljóðfærakost í skólum og frístundaheimilum sem börn geta kynnst og þau ættu að geta beðið um leiðbeiningar frá kennara – þá er ekki verið að tala um formlegt reglulegt nám heldur stuðning við fyrstu skref á grundvelli áhuga. Slíkur aðili gæti verið tiltækur t.d. á hálfs mánaðar fresti og hjálpað þeim sem vildu nýta tækifærið til að fá aðstoð við t.d. gítarleik eða fiðluleik í smærri eða stærri hópum. Fyrirmyndin er til í stórum erlendum verkefnum og hafa sum verið kynnt hér á landi.

#### Tónmennt stendur sterkum fótum og kórar eru starfandi í öllum skólum

- Kennaraskortur mun valda miklum vanda um ófyrirséða framtíð hvað varðar tónmennt. Það hjálpar ekki að mat til launa listgreinakennara er ekki jákvætt. Samningsaðilar gætu skoðað að meta námsár á framhaldsstigi í listgreinum eða 4.stigs nám (eða háskólanám) til launa til viðbótar við kennaralaunin til að jafna þessa stöðu.
- Leiðir til að gera starfið eftirsóknarvert eru nokkrar og þær mikilvægustu eru annars vegar aðstaða og hins vegar tækifæri. Tækifæri til að biðja um búnað, biðja um aðstoð í stærri verkefnum, biðja um svigrúm til að geta prófað sig áfram.
- Kórastarf er uppeldisstarf og byggir á tengslum við börnin traust og virðing er grundvöllur starfsins og erfitt að koma sem gestur inn í stofnanir til að halda upp slíku starfi án þess að tengjast börnum og ungmennum í skólastarfinu almennt. En þetta er hægt – til þess þarf hins vegar sérstakt fólk sem hrífur óvenjulega sterkt með sér annað fólk.
- Styðja þarf við það kórastarf sem fyrir er í skólum og skapa samstarfsvettvang.

#### Búnaður hefur allur stórbatnað og starfsvettvangurinn því eftirsóknarverðari

• Skortur á tónlistarkennurum er yfirvofandi. Reykjavíkurborg þarf að grípa til aðgerða og laða vel menntaða tónlistarnemendur borgarinnar að slíku námi. Styrkja þarf viðleitni háskólastofnana til að bjóða upp á slíkt nám og vinna náið með nemendum þar. Mögulegt væri að bjóða námsstyrki í þessu sambandi.

- Það er langhlaup að laða að kennara og bæta búnað en því lengur beðið er því stærri verður uppsafnaður vandi vegna skortstöðu á öllum sviðum. Við verðum að þora að byrja hægt en örugglega og stækka svo smám saman.
- Til dæmis gæti borgin áætlað um 20 mkr á hverju ári í kaup á búnaði vegna tónmenntar, hljóðfærakynninga og sjálfsnáms á sviði tónlistar í grunnskólum og frístundaheimilum og aðstöðu til að hafa þann búnað aðgengilegan, vel við haldið og endurnýjaðan reglulega.

#### Börn upplifa muna meira sjálfstæði í námi sínu og stjórn á því, sjá ofar

- Foreldrar eru í nánum tengslum við nám barna sinna og hafa áhrif á skólastarfið
- Virkjum foreldra. Að skapa vítt eignarhald og þátttöku á námi og tækifærum barna er spennandi og mikilvægt verkefni. Notkun tækni til að deila viðfangsefninum og framvindu í náminu er mikilvægur þáttur. Einnig mætti skoða möguleika á því að bjóða áhugasömum foreldrum stuðning í hljóðfæraleik í formi kennslu í t.d. smærri hópum.

#### Tækni er notuð til að auka sýnileika og þátttöku allra hlutaðeigandi

• Styðja þarf kennara til að nota tækni sem er við hendina í símum og spjaldtölvum til að nálgast með nýjum hætti "skjalfestingu" námsins og framvindu þess. Upptökur skapa svo möguleika til að leyfa aðstandendum að fylgjast með árangri, styðja við æfingar með því að fá upplýsingar á þessu formi og margt fleira. Kjarasamningar heimila greiðslur vegna notkunar tölvu með tónlistarforriti við kennslu að beiðni skólastjóra og eru möguleikarnir sem það skapar vannýttir.

#### Skýr og opin leið (fjölbreytt?) er fyrir þau sem lengst ná í námi hvað varðar skólagöngu

 Síðan þessir punktar voru teknir saman (2015) hefur verið stofnaður menntaskóli í tónlist og er sérlega forvitnilegt að fylgjast með þróun mála. Sérstaka áherslu þarf að leggja á að fylgjast með kerfinu og tryggja að þessi viðbót sé í raun viðbót við flóruna í tilboðum en valdi ekki fækkun tækifæra eða minnki fjölbreytni tilboða til lengri tíma litið.

#### Mikill áhugi á tónlistarnámi

- Enn er það svo að nemendur sem sækja um tónlistarnám í Reykjavík eru mun fleiri en þau sæti í skólunum sem eru í boði. Þannig er ekki hægt að kvarta undan áhugaleysi.
- Hitt er að menn hafa áhyggjur af framtíðarsýn tónlistarnemenda og því hversu fáir halda áfram í námi í sumum hljóðfærum.
- Einnig hafa menn áhyggjur af kennaraskorti á sviði tónlistar. Tryggja þarf að þeir aðilar sem námið bjóða geri það sem sameinað og sterkt afl.

#### Færri og stærri tónlistarskólar

• Tónlistarskólar í Reykjavík eru margir og flestir litlir. Í skoðun er hvernig megi stuðla að færri og sterkari skólum þegar litið er til framtíðar.

#### Fylgiskjal 6.4.1. Yfirlit um tónlistarnám frá Skóla- og frístundasviði Reykjavíkurborgar

#### Hagræðing hefur skilað lægri efnahagsþröskuldum

• Efnahagsþröskuldar í tónlistarnámi eru staðreynd. Skólagjöld í nýjum menntaskóla í tónlist verða lægri en þekkst hefur lengi í Reykjavík og ekki fyrirséð hvaða áhrif það hefur á gjöld annarra. Víst er að betri og öruggari fjármögnun kennslu á efri stigum stuðlar að öryggi í rekstri sem gæti mögulega gert skólum kleift að lækka skólagjöld.

# Tónlist er notuð í borginni til að brúa bil milli hópa samfélagsins og skapa sameiginlegan, menningarlega fjölbreyttan vettvang.

- Nýlega fékk Hafdís í Kramhúsinu verðlaun fyrir sitt starf. Undir hennar stjórn hefur t.d. um árabil verið boðið upp á námskeið með kennurum víða að úr heiminum á sviði danslistar. Fordæmi hennar er ómetanlegt. En mögulega eru líka ónotuð tækifæri til að ráðgjafar og jafnvel samstarfs. Það er erfið stefna að vilja alltaf finna upp hjólið. Mikilvægt er að vinna með rótgrónum aðilum með mikla og vandaða sérhæfingu. Þannig nýtum við reynslu sem liggur fyrir og getum byggt upp af öryggi.
- Verkefnið "List fyrir alla" hefur stigið sín fyrstu skref. Mikilvægt er að Reykjavíkurborg og skólar hennar verði börnum og ungmennum vettvangur listrænnar upplifunar og stigi sterkt inn í þetta verkefni. Leikskólar og grunnskólar þurfa að geta pantað til sín og sótt listviðburði. Það er ekki tryggt, þó að börn búi í borginni, að þau hafi aðgang að og njóti listviðburða. Á vettvangi frístundar eru tækifæri til að skapa mun betri og fjölbreyttari aðstöðu til iðkunar lista fyrir þá sem það kjósa.

# Skólahljómsveitir Reykjavíkur

Í borginni starfa fjórar skólahljómsveitir, jafnar að stærð. Nemendur fá einkakennslu á hljóðfæri á grundvelli aðalnámskrár og skylda er að taka þátt í hljómsveitaræfingum og starfi. Nemendaheimildir voru alls 441 í borginni en eru eftir 1.jan. 2017 eru heimildir 480 nemendur og kemst sú fjölgun að fullu til framkvæmdar haustið 2017. Þannig verð 120 nemendur í hverri hljómsveit frá og með hausti 2017.

### Samvinna og árangurs- og ánægjukannanir

Skólahljómsveitirnar eru í fjölbreyttu samstarfi við tónlistarskóla, tónlistarmenn og aðra listamenn, grunnskóla, hverfafélög, starfsstaði SFS auk samstarfs á landsvísu í gegnum Samtök íslenskra skólalúðrasveita.

Tvær kannanir hafa verið gerðar á undanförnum árum. Önnur árið 2010 fyrir skólahljómsveitir eingöngu og svo árið 2013 var gerð könnun fyrir bæði skólahljómsveitir og tónlistarnám í tónlistarskólum. Árangur hefur ekki verið kannaður í þessum könnunum enda ekki móta hvernig meta skuli góðan árangur í tónlistarstarfi, fyrir utan próftöku.

Gegnumgangandi mikil ánægja hjá foreldrum með starf skólahljómsveitanna. En vekja skal athygli á að kannanir eru mjög gamlar og löngu tímabært að gera nýjar. Stefnt er að því að leggja fyrir nýjar kannanir í maí 2017.

### **Fyrirkomulag**

Nemendur í skólahljómsveitum í Reykjavík fá á bilinu 40-60 mínútur í hljóðfærakennslu á viku og að mestu í formi einkatíma. Byrjendur fá stystan tíma.

Reynt er eftir megni að kenna nemendum hljóðfæratímana í sínum grunnskóla og á skólatíma þar sem því verður við komið. Kennt er eftir Aðalnámskrá tónlistarskóla.

Í hljómsveitarhluta námsins er öllum hljómsveitunum skipt upp í aldurshópa, þrjá til fjóra þar sem stundum er gripið til þess að hafa sér sveit byrjenda á fyrsta ári.

Hljómsveitaræfingar eru 1x til 2x í viku, lengd æfinga er nokkuð misjöfn eða frá 50 mín til 90 mínútur í einu. Þær eru haldnar í heimastöð hverrar hljómsveitar í tilteknum grunnskóla nema að Hljómskálinn er æfingastöð Skólahljómsveitar Vesturbæjar og Miðbæjar.

Nemendum gefst kostur á tónfræðikennslu ýmist í samvinnu við tónlistarskóla, innan hljómsveitarinnar auk stuðnings á neti í nokkrum tilfellum.

Námsmat í hljómsveitunum er fólgið í samræmdum áfangaprófum á vegum Prófanefndar tónlistarskóla, þess á milli taka nemendur vorpróf. Ekki er skylda að taka áfangapróf þó hvatt sé til þess.

#### Fylgiskjal 6.4.2. Skólahljómsveitir Reykjavíkurborgar

### Dreifing þjónustu - skipulag

Skólahljómsveitir þjóna ákveðnum skólum og mikið skipulag fylgir framboði á einkatímum nemenda á skólatíma í einstökum skólum. Ekki er hægt að bjóða kennslu á öll hljóðfæri í öllum skólum. Myndin hér fyrir neðan sýnir dreifingu þjónustu eftir skólum og fjölda nemenda í Skólahljómsveit Árbæjar og Breiðholts á yfirstandandi skólaári:



### Greining á fjölda nemenda í skólahljómsveitum - aldursdreifing, fæðingarár

Þar sem starfsemin er aldursskipt í þrjár sveitir þá er ljóst að styrkur t.d. elstu sveitar sveiflast milli ára. Hæsta súlan sýnir fjölgun sem varð í SÁB þegar stærð sveita var jöfnuð, almennt eru ekki svo miklar sveiflur milli árganga inn í sveitirnar.

Mismunandi er hversu samstarf við tónlistarskóla er umfangsmikið, en þá koma nemendur á blásturshljóðfæri í skólahljómsveitina og fá að spila með henni.

#### Fylgiskjal 6.4.2. Skólahljómsveitir Reykjavíkurborgar

### Styrkleikar og tækifæri

Í djúpgreiningu á skóla- og frístundasviði tóku stjórnendur sveitanna saman eftirfarandi atriði, svót. Stjórnendur sjá styrk í mjög öflugu foreldrastarfi og velvilja yfirvalda. Þau sjá einnig tækifæri til þróunar og breytinga sem þeim finnst þessi vettvangur vera kjörinn fyrir.

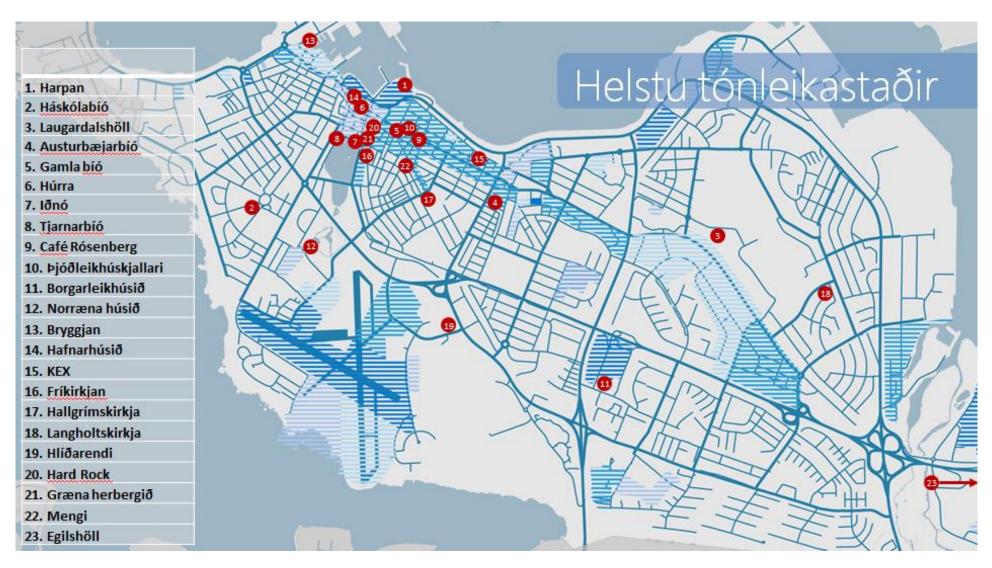
STYRKLEIKAR	VEIKLEIKAR	ÓGN	TÆKIFÆRI
Ódýrt og aðgengilegt tónlistarnámfyrir flest börn í Reykjavík.	Náms- og kennsluaðstaða óörugg og í mörgum tilfellum óboðleg.	Að vera skilgreindur sem "frístund" í staðinn fyrir að vera "skóli" utan um tónlist.	Mjög góður vettvangur fyrir faglega þróun og nýjungar.
Einstaklingsmiðað nám og félagslegi þátturinn mjög mikill.	Enginn stuðningur við nemendur með sérþarfir.	Samkeppni við fjölbreytt íþrótta- og tómstundastarf. Einnig skortur á fagmennsku á sviði kennslu.	Miklir möguleikar á að stækka starfið og ná til nýrra hópa, t.d. innflytjanda
Mjög öflugtforeldrasamstarf og samstarf við grunnskóla og tónlistarskóla gott.	Heildarfjöldi nemenda enn aðeins of lítill til að halda sveitunum alltaf fullmönnuðum.	Samgöngur á milli hverfa eru oft og tíðum þannig að nemendur úr ákveðnum hverfum geta ekki sítt námið. Dæmi ÁrbBreiðh.	Tækifæri á samvinnu við ólíka hópa mikil. T.d. leiklist, starfandi tónlistarfólk, LHÍ, hljómsveitir, nærumhverfið.
Stöðugtfjármagn og velvilji stjórnvalda í borginni	Hljóðfæraflotinn orðinn mjög aldraður og úr sér genginn.	Lítil endurnýjun á hæfum kennurum og stjórnendum. Þyrfti að skoða leiðir til þess að þjálfa og gefa færi á að prófa sig áfram sem stjórnandi.	Hægter að virkja foreldra enn beturt d. með því að bjóða þeim upp á grunnkennslu á hljóðfæri, fræðslukvöld og fleira.
Sjálfbærni. Nemendur læra að gefa af sér til samfélagsins, t.d. með því að spila á elliheimilum, við hátíðleg tækifæri auk eigin tónleika.	Starfslýsing stjórnanda og markmið og stefnur í náminu ekki til staðar og þar af leiðandi ekki nein mælitæki á árangur	Skólahljómsveitirnar eru lítill hópur í stóru kerfi Rvk sem týnist auðveldlega. Boðleiðir of langar og oft óskilvirkar.	Aukinn sýnileiki bæði í raun og netheimum Tæknin býður upp á marga möguleika sem enn eru ónýttir, bæði í kennslu og sýnileika hljómsveitanna.

# Kostnaður borgarinnar vegna reksturs skólahljómsveita og kostnaðarþátttaka foreldra

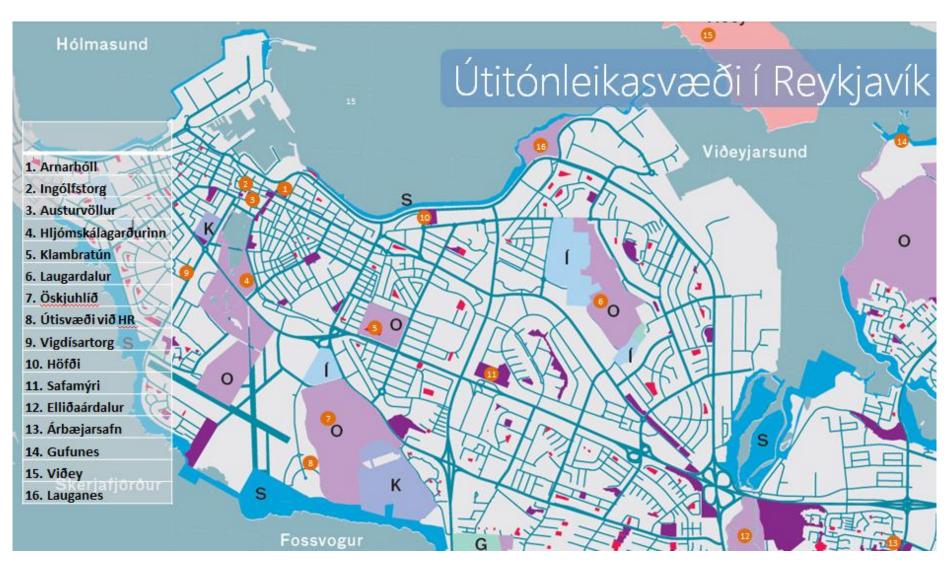
Kostnaður borgarinnar vegna skólahljómsveita er milli 45-50 mkr á hverja sveit og á árinu 2017 bætast 4.5 mkr á hverja sveit vegna fjölgunar nemenda. Kostnaðarþátttöku foreldra er markvisst haldið í lágmarki og felst annars vegar í gjöldum sem falla undir ráðstöfun frístundakorts og hins vegar hljóðfæraleigu fyrir þá sem þurfa. Gjöldin vegna 2016-2017 voru 27.350 kr. og hljóðfæragjald 8.300 kr.

Framlag borgarinnar vegna hvers nemanda í skólahljómsveit er sambærilegt við framlag borgarinnar vegna nemenda í tónlistarskóla. Rekstrarkostnaði er haldið í lágmarki og nánast öll starfsemi fer fram innan grunnskólanna.

# Helstu tónleikastaðir í Reykjavík



# Útitónleikasvæði í Reykjavík



### Svör mennta- og menningarmálureytis við fyrirpurn um stuðning við tónlistarlífið

### Tónlistarsjóður

Kyn er skilgreint eftir tengilið þegar um hópa eða lögaðila er að ræða. Úthlutað hefur verið tvisvar á ári nema fyrsta árið en þá var úthlutað þrisvar og var eingöngu úthlutað ferðastyrkjum í þriðju úthlutun. Styrkir hafa verið frá 40 þús. kr. til 5 m. kr.

					Úthlutuð	Úthlutað		Fjöldi
Ár	Karlar	Fjárhæð	Konur	Fjárhæð	fjárhæð	samtals	Tímabil	styrkja
2007	33	16.090.000	20	5.390.000	21.480.000	44.177.740	Fyrra tímabil	53
	35	13.250.000	16	4.900.000	18.150.000		Seinna tímabil	51
	10	2.104.500	8	2.443.240	4.547.740		Ferðastyrkir	16
2008	45	26.600.000	27	11.890.000	38.490.000	52.020.000	Fyrra tímabil	69
	52	9.430.000	25	4.100.000	13.530.000		Seinna tímabil	79
2009	60	30.400.000	27	10.245.000	40.645.000	53.195.000	Fyrra tímabil	88
	37	7.125.000	32	5.425.000	12.550.000		Seinna tímabil	69
2010	28	12.300.000	24	4.310.000	16.610.000	25.560.000	Fyrra tímabil	50
	27	5.450.000	23	3.500.000	8.950.000		Seinna tímabil	50
2011	33	21.100.000	26	9.400.000	30.500.000	40.520.000	Fyrra tímabil	51
	27	7.100.000	18	2.920.000	10.020.000		Seinna tímabil	43
2012	28	6.600.000	29	11.110.000	17.710.000	30.700.000	Fyrra tímabil	53
	33	8.875.000	18	4.115.000	12.990.000		Seinna tímabil	49
2013	30	15.275.000	34	11.735.000	46.510.000	80.811.000	Fyrra tímabil	61
	47	22.609.000	26	11.692.000	34.301.000		Seinna tímabil	73
2014	30	19.800.000	30	14.130.000	33.930.000	43.680.000	Fyrra tímabil	60
	22	5.750.000	14	4.000.000	9.750.000		Seinna tímabil	36
2015	25	24.395.000	22	17.180.000	41.575.000	53.925.000	Fyrra tímabil	47
	24	6.700.000	23	5.650.000	12.350.000		Seinna tímabil	47
2016	31	23.300.000	29	17.701.000	41.001.000	62.546.000	Fyrra tímabil	60
	23	9.085.000	32	12.450.000	21.545.000		Seinna tímabil	55

### Útflutningssjóður íslenskrar tónlistar - ÚTÓN

Kyn er ekki skilgreint þegar um lögaðila er að ræða. Úthlutað fyrst árið 2013.

									Fjöldi
Ä	Ár	Karlar	Fjárhæð	Konur	Fjárhæð	Lögaðilar	Fjárhæð	Úthlutað samtals	styrkja
	2013	35	4.400.000	14	2.350.000	21	6.850.000	13.600.000	70
	2014	60	9.050.000	22	3.400.000	25	6.951.500	19.401.500	107
	2015	36	6.200.000	12	2.400.000	47	15.801.500	24.551.500	95
	2016	38	7.960.000	18	2.730.000	24	7.961.499	19.851.499	80

### Hljóðritasjóður

Kyn er skilgreint eftir tengilið þegar um lögaðila er að ræða. Úthlutað fyrst árið 2016.

<i>J</i>	0	8 1 6			<i>J</i>			
Ár	Konur	Fjárhæð	Karlar	Fjárhæð	Úthlutað samtals	Tímabil	Fjöldi styrkja	
2016	30	11.700.000	54	21.800.000	33.500.000	Seinna tímabil		84

# Tónlistarborgin Reykjavík

## Fylgiskjöl við tillögur starfshóps

### Skýrslur og ítarefni

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U- /-	ORVISIUI	Hartin

- 6.7.1. Sóknarfæri skapandi greina á höfuðborgarsvæðinu
- 6.7.2. A Music City Infographic
- 6.7.3. The Mastering of a Music City
- 6.7.4. Music Cities Tool Kit
- 6.7.5. Katowice Music Strategy Sjá http://miasto-

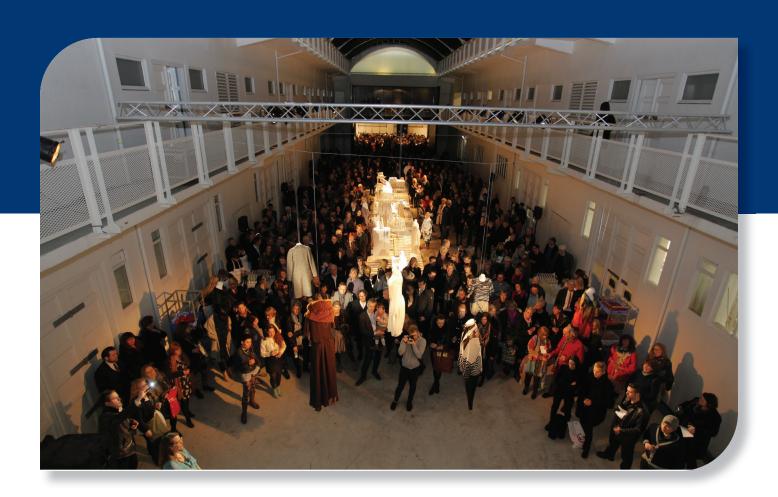
ogrodow.eu/userfiles/images/UNESCO/Polityka rozwoju sektora muzycz nego w Katowicach EN.pdf

- 6.7.6. Seattle City of Music 2020 Vision
- 6.7.7. Manifesto for the Night Time Economy
- 6.7.8. UNESCO Creative Cities Mission Statement

Fylgiskjöl 6.7. Skýrslur og ítarefni

### VAXTARSAMNINGUR FYRIR HÖFUÐBORGARSVÆÐIÐ





# Sóknarfæri skapandi greina á höfuðborgarsvæðinu

Apríl 2014

Margrét Sigrún Sigurðardóttir – Júlía Björnsdóttir Rannsóknarmiðstöð skapandi greina Sóknaráætlun höfuðborgarsvæðisins 2013



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Vaxtarsamningur höfuðborgarsvæðisins skiptist í átta verkefni og er þessi skýrsla samantekt á verkefni 1.6 *Skapandi greinar og græna hagkerfið*. Yfirmarkmið verkefnisins er að styrkja stöðu Reykjavíkur sem menningarhöfuðborgar Íslands, en markmið verkefnisins er:

 Að auka hlut skapandi greina og græna hagkerfisins í atvinnu- og menningarlífi höfuðborgarsvæðisins.

Stýrihópur¹ yfir verkefnaflokknum lagði fyrst og fremst áherslu á skapandi greinar og skipti verkefninu í fjóra hluta:

- Farið verður yfir helstu rannsóknarskýrslur hér á landi og erlendis.
- Gagnrýnin yfirferð á talnagrunnum með Hagstofu Íslands og Rannsóknarmiðstöð skapandi greina hjá Háskóla Íslands með það að markmiði að ná samkomulagi við Hagstofu Íslands um endurskoðun talnagrunns og athugun á vægi greinarinnar í hagkerfi höfuðborgarsvæðisins.
- Fundað með lykilaðilum m.a. úr Bandalagi íslenskra listamanna, atvinnu- og nýsköpunarráðuneyti, hugbúnaðargeiranum, háskólum og menningarsviðum sveitarfélaganna.
- Samningur var gerður við Rannsóknarmiðstöð skapandi greina sem fólst í kortlagningu á stöðu skapandi greina með viðtölum og rýnihópum, og aðstoð við endurmat á efnahagslegum umsvifum.

Hér fer samantekt á greiningu og niðurstöðum vinnu Rannsóknarmiðstöðvar skapandi greina hjá Háskóla Íslands um stöðu skapandi greina á höfuðborgarsvæðinu.

SÓKNARFÆRI SKAPANDI GREINA Á HÖFUÐBORGARSVÆÐINU



Skapandi greinar eru sjálfstæð uppspretta efnahagslegra gæða og mikilvægt samfélagslegt afl sem hefur umtalsverð sóknarfæri í frjóu borgarumhverfi. Með heildstæðri stefnu í mennta-, menningar- og skipulagsmálum geta sveitarfélög á höfuðborgarsvæðinu stutt vöxt og viðgang skapandi greina með þeim efnahagslega og samfélagslega ávinningi sem þeim fylgja.

### Samantekt og tillögur



Höfuðborgarsvæðið hefur uppá margt að bjóða sem laðar að einstaklinga í skapandi greinum þrátt fyrir að rekstrarumhverfi í íslensku efnahagslífi sé ekki talið ákjósanlegt.

Smæðin hefur bæði kosti og galla og töluverðir möguleikar eru fyrir höfuðborgarsvæðið að byggja á þeim kostum sem smæðin hefur, til að mynda með því að byggja upp kjarna þar sem einstaklingar úr mörgum greinum geta komið saman og unnið saman. Það er þó mikilvægt að hafa í huga að til að opinberar aðgerðir skili árangri þurfa þær að vera unnar í samráði við grasrótina.

Sveitarfélög standa undir bróðurpartinum í opinberum útgjöldum til menningarmála, en þau gegna stóru hlutverki í tónlistar – og almennri menntun sem leggja þannig grunn að þrótti skapandi greina. Með uppbyggingu í menntamálum, sem og skipulagsmálum skapa sveitarfélög umhverfi sem hefur veruleg áhrif á þá sem starfa og búa innan sveitarfélagsins. Í rannsókninni sem hér er kynnt, kemur fram að skipulagsmál eru afgerandi þáttur, þegar kemur að uppbyggingu frjós umhverfis skapandi greina. Sjónræn gæði geta til að mynda skipt sköpum. Af þessu leiðir að engin ein altæk formúla er til fyrir skipulag skapandi hverfa. Niðurstaðan er fremur að aðdráttaraflið sé sérstaða (authenticity) hvers hverfis fyrir sig en eðli málsins samkvæmt verður sérstað ekki margfölduð eða endurtekin óbreytt.

Áhersla opinberra aðila í eflingu skapandi greina hefur hingað til ekki síst beinst að steinsteypu, fremur en til að mynda eflingu verkefnasjóða í listum og skapandi greinum, þar sem afrakstur er ekki jafn sýnilegur. Í ljósi þeirrar gagnrýni sem fram kemur á núverandi áherslur væri farsælla að leggja áherslu á innihald (s.s. með stuðningi við verkefnasjóði) fremur en umbúnað skapandi greina.

#### Aðgerðir til að bæta húsnæðisaðstöðu skapandi greina:

- Enduruppbygging aðstöðu sambærilegri Hugmyndahúsi Háskólanna.
- Með húsnæðismiðlun, þar sem einstaklingar og lítil fyrirtæki geta leigt með öðrum í sömu sporum.
- Með ívilnunum til einstaklinga sem leigja húsnæði út til einyrkja og lítilla fyrirtækja.
- Samstarf við bókasöfn og önnur almenningsrými þar sem einstaklingar geta fengið vinnuaðstöðu með aðgangi að neti og kaffiaðstöðu. Aðstaðan gæti bæði verið formleg, þar sem sækja þarf um, og þannig að hægt sé að koma óvænt í nokkra tíma á dag tímabundið.

Fyrirtæki í skapandi greinum eru oftast lítil og reiða sig mjög á einyrkja í rekstri. Mikilvægt er að byggja upp umhverfi þar sem stuðningur við lítil fyrirtæki og einyrkja gerir þeim kleift að vinna við list sína.

#### Aðgerðir fyrir einyrkja og lítil fyrirtæki sem snúa bæði að sveitarfélögum og ríki:

- Fræðsla um réttindi og skyldur einyrkja og lítilla fyrirtækja.
- Stuðningur við sprotafyrirtæki, sambærilegur því sem var til staðar í Hugmyndahúsi Háskólanna.
- Fjölbreytt styrkjaumhverfi með aðkomu bæði opinberra aðila og einkaaðila.
- Fyrirtæki í skapandi greinum standa frammi fyrir flestum sömu hindrunum og fyrirtæki í öðrum greinum. Einföldun skatta- og haftaumhverfis myndi leiða til aðgengilegra rekstrarumhverfis.

# Aðgerðir til að bæta rekstrarumhverfi skapandi greina, sem snúa einkum að ríkinu:

- Einfalda þarf virðisaukaskattskerfið, því frumskógur reglubyrðar er íþyngjandi fyrir marga einyrkja sem starfa í skapandi greinum.
- Skapandi greinar eru mjög vinnuaflsfrekar og skattar á laun, fyrst og fremst tryggingargjald, eru greininni þung í skauti. Lækkun tryggingargjalds er sú aðgerð sem vafalítið myndi bæta rekstrarumhverfi greinanna hvað mest.
- Gera þarf tvísköttunarsamninga við fleiri ríki, en íslenskir listamenn eru með tekjur í mörgum ríkjum þar sem þeir sæta tvísköttun.
- Gjaldeyrishöftin hamla vexti og viðgangi stærri fyrirtækja, en þau hafa val um að flytja starfsemi sína til annarra landa. Smærri fyrirtæki, sem trauðla hafa

þetta val, blæða einnig vegna haftanna. Afnám gjaldeyrishafta væri því mikilvægt skref að betra rekstrarumhverfi.

Forsenda þess að skapandi greinar geti vaxið og dafnað í rekstrarlegum skilningi er að menntun og endurmenntun stuðli að hvoru tveggja listsköpun og þekkingu til að reka fyrirtæki í skapandi greinum.

# Aðgerðir í menntun og endurmenntun í skapandi greinum sem snúa bæði að sveitarfélögum og ríki:

- Efla listnám barna og unglinga
- Endurmenntun í skapandi greinum mætti efla og gera á skipulegan hátt eftir því módeli sem ÚTÓN² hefur byggt upp. Ákveðin samlegð milli greina og tækifæri til að læra af hvort öðru fengist með því að efla samstarf milli greina innan skapandi greina.
- Diplómanám í viðskiptum fyrir einstaklinga innan skapandi greina gæti stuðlað að bættri viðskiptaþekkingu í skapandi greinum.
- Nýsköpunarbúðir í skapandi greinum, tengdar aðstöðu svo sem endurreistu hugmyndahúsi, gætu veitt innspýtingu í skapandi greinar með hraðkúrsi í nýsköpun og frumkvöðlastarfsemi.

Höfuðborgarsvæðið hefur þegar byggt upp stóra viðburði í kringum skapandi greinar, svo sem Iceland Airwaves, HönnunarMars og EVE fanfest. Á þessum viðburðum mætast skapandi greinar og almenningur í gegnum listina. Reykjavík hefur til viðbótar fengið viðurkenningu sem bókmenntaborg og þar eru tækifæri sem hægt væri að nýta til þess að laða að erlenda einstaklinga, bæði listamenna og ferðamenn. Ein hugmynd væri að leggja áherslu á skapandi Reykjavík, en í því er mikilvægt að markaðáherslan verði ekki yfirgnæfandi með þeim afleiðingum að skapandi greinar snúist gegn átakinu.

<sup>&</sup>lt;sup>2</sup> Sjá nánar http://www.uton.is

- Safna saman upplýsingum um þá skapandi viðburði sem eru á höfuðborgarsvæðinu. Slíka upplýsingaveitu væri hvoru tveggja hægt að nýta í ferðaþjónustu og með það fyrir augum að hvetja til innlendrar neyslu.
- Velja úr viðburði sem hafa möguleika á að vaxa með alþjóðlegri skírskotun og beita sömu aðferðafræði og beitt var á Iceland Airwaves í því að kynna hátíðina erlendis. Hér eru sérstaklega tækifæri í þeim viðburðum sem sem haldnir eru yfir vetrarmánuðina
- Uppbygging listamannasetra þar sem erlendir listamenn geta komið og unnið gegn því að sína list sína. Með því að byggja upp samfélög í kringum slík listamannasetur styrkist tengslanet þeirra sem vinna í skapandi greinum.
- Skoða lagalegar forsendur á endurgreiðslukerfum sambærilegum þeim sem eru í kvikmyndagerð í öðrum greinum skapandi greina .

Með því að bæta samgöngur og dreifa ferðamannastraumi er hægt að byggja upp líflega þorpsstemmningu á fleiri stöðum á höfuðborgarsvæðinu. Með því að skoða höfuðborgarsvæðið betur út frá sjónrænum gæðum og byggja á sérkennum hvers hverfis mætti gera fleiri hverfi en 101 eftirsóknarverð.

# Aðgerðir til að skapa "þorp" á fleiri stöðum en í miðborg Reykjavíkur, sem snúa að sveitarfélögum og SSH:

- Með léttlestarsamgöngum skapast aðstæður til að byggja upp skapandi "þorp" á fleiri stöðum en í 101 Reykjavík.
- Kortlagning á sjónrænum gæðum á höfuðborgarsvæðinu.
- Mikilvægt er að létta ferðamannaálag í 101 Reykjavík og koma þannig í veg fyrir að borgin tapi sérstöðu (authenticity).
- Hafnarfjarðarbær hefur verulegt aðdráttarafl fyrir skapandi greinar og markvissar aðgerðir í að "færa Hafnarfjörð nær miðbænum" skapa tækifæri í uppbyggingu, til að mynda í ferðaþjónustu.



Í samræmi við þróun erlendis (Margrét Sigrún Sigurðardóttir, Tómas Young, 2011, bls.20) hefur umræða um listir og menningu undanfarin ár verið mótuð af áherslu á skapandi greinar í hagrænu samhengi. Umræðan hér á landi hefur verið lituð af skorti á gögnum, en hingað til hefur eina hagræna vísbendingin sem til er um rekstur fyrirtækja og einstaklinga í skapandi greinum verið virðisaukaskattsskyld velta fyrir árin 2005 til 2009<sup>4</sup>. Þetta hefur verið mjög bagalegt í ljósi þess að velta segir ekki nema lítinn hluta sögunnar, og er ekki eins áreiðanleg vísbending um rekstrargrundvöll eins og til að mynda virðisauki. Þá eru ekki allar greinar innan skapandi greina virðisaukaskattsskyldar, sem skekkir myndina enn frekar. Samkvæmt kortlagningu á skapandi greinum í hagrænu samhengi var virðisaukaskattskyld velta 200 milljarðar króna árið 2009, eða um 7% af allri virðisaukaskattsskyldri veltu. Á sama tíma störfuðu um níu þúsund manns eða 7% vinnuaflsins í skapandi greinum (Margrét Sigrún Sigurðardóttir, Tómas Young, 2011). Með þessum tölum var staðfest að skapandi greinar eru mikilvægt afl í nútímahagkerfi. Kortlagningin vakti umtalsverða athygli og leiddi til þess að skapandi greinar hafa ítrekað verið nefndar í pólitísku samhengi og ljóst að stjórnvöld horfa til þeirra sem vaxtarsprota. Ein birtingarmynd þessa er áhersla í sóknaráætlun höfuðborgarsvæðisins, sem fyrirliggjandi skýrsla er afrakstur af. Önnur er að skapandi greinar hafa nú sess í verkefnum atvinnu- og nýsköpunarráðuneytisins.

Árið 2011 vann Rannsóknarmiðstöð skapandi fyrir greina skýrslu iðnaðarráðuneytið um stuðningsumhverfi skapandi greina. Sú skýrsla hefur ekki verið birt en af gagnaöflun sem unnin var fyrir hana er ljóst að fyrirtæki í skapandi greinum standa frammi fyrir flestum sömu takmörkunum og önnur fyrirtæki á Íslandi; gjaldeyrishöft og regluverk gera erfitt um vik að reka fyrirtæki í alþjóðlegri samkeppni frá Íslandi. Aðgengi að fjármagni er takmarkað og lenda fyrirtæki í skapandi greinum gjarnan í því að vera of lítil til að laða að fjárfesta, eða að reksturinn uppfyllir ekki þá nýnæmiskröfu sem opinberir stuðningsaðilar gera, þar sem að ný hönnun eða útfærsla á afurð sem þegar er til fellur ekki undir

<sup>&</sup>lt;sup>4</sup> Sjá þó skýrslu SSH um sóknaráætlun: Hagkerfi höfuðborgarsvæðisins.

nýsköpun. Þá eiga opinberir aðilar erfitt um vik að styðja fyrirtæki sem ekki hyggja á erlendan markað og koma þar til samkeppnisástæður. Þá er ljóst að fyrirtæki á alþjóðlegum markaði eru ekki rekin á Íslandi af því að það sé gott að reka fyrirtæki á Íslandi heldur þrátt fyrir það, og þá vegna þess að stofnendur og eigendur vilja búa á Íslandi. Spurningin sem vaknar er því, hvað styður við að skapandi einstaklingar velja að búa og vinna á Íslandi, og taka með því þátt í efnahagslegri uppbyggingu?

Það er eftirsóknarvert, jafnt í samfélagslegum sem efnahagslegum skilningi, að byggja upp borgir og hverfi sem einstaklingar í skapandi greinum vilja búa í. Í borgarfræðilegum skilningi skiptir fjölbreytni í menningarframboði, umburðarlyndi og ákveðnir lífsstílsmöguleikar máli við val á staðsetningu og þá sérstaklega þeirra sem starfa í skapandi greinum og innan hinnar skapandi stéttar (Florida, 2003, bls. 215-218). Með búsetu sinni skapa þeir svo aftur innihald sem nýtist í hagrænum skilningi, meðal annars í ferðaþjónustu.

Í þessari skýrslu verður byggt á þeirri grundvallarforsendu að til þess að skapandi greinar vaxi og dafni á höfuðborgarsvæðinu þurfi umhverfi að vera þannig að þeir sem vinna innan skapandi greina velji að búa þar. Höfuðborgarsvæðið hefur nú þegar laðað til sín erlenda listamenn, og þá helst tónlistarmenn, sem velja að búa hér og vinna að list sinni. Markmið þessarar skýrslu er að auka skilning á því hvað gæti stuðlað að vexti skapandi greina, hvað geri afmörkuð landsvæði "skapandi" og hvað þurfi til þess að byggja upp skapandi svæði. Horft er til borgarskipulags í víðu samhengi og ein meginspurningin sem leitað er svara við er: Hvernig þarf umhverfi að vera til að skapandi greinar vaxi og dafni? Litið verður til erlendra rannsókna og skrifa um stöðu og hlutverk skapandi greina í hagkerfinu, þá sérstaklega í ljósi efnahagsþrenginga. Í framhaldi er litið til aðstæðna á höfuðborgarsvæðinu. Í þeim hluta er áherslan á hvaða atriði það eru sem gera höfuðborgarsvæðið að eftirsóknarverðum búsetustað fyrir skapandi einstaklinga. Að lokum eru niðurstöður fræðilegrar umfjöllunar og rýnihópa dregnar saman og ályktun dregin af því hvar sóknarfæri séu helst að finna.



Til þess að svara rannsóknarspurningunni: *Hvernig þarf umhverfi að vera til að skapandi greinar vaxi og dafni?* var litið til eigindlegs hluta rannsóknar sem unnin var af Hamburg Kreativgesellschaft (Sjurts & Hartmann, 2011). Viðtalsramminn var að mestu leyti byggður á þeim ramma sem Hamburg Kreativgesellschaft og Hamburg Media School notuðu við SWOT<sup>5</sup> greiningu á Hamborg sem borg skapandi greina og menningar en aðlagaður að höfuðborgarsvæðinu.

Markmiðið með eigindlegum rannsóknum er að sjá þær aðstæður sem eru til rannsóknar með sjónarhorni þátttakenda (Esterberg, 2002; Merriam, 2009). Markmið með eigindlegum rannsóknum er annað en megindlegum og ekki er hægt að alhæfa út frá svörum þeirra sem taka þátt. Markmiðið er ekki að lýsa skoðun allra sem starfa<sup>6</sup> innan skapandi greina, heldur að fá vísbendingu um þá umræðu sem fram fer á milli einstaklinga í skapandi greinum.

Gagnaöflun til greiningar á þeim þáttum sem hafa áhrif á það hvar einstaklingar sem starfa í skapandi greinum velja að búa og starfa var þríþætt.

- Settir voru saman rýnihópar þeirra sem starfa í skapandi greinum, skipt eftir greinum.
- 2) Tekin voru viðtöl við einstaklinga starfandi í skapandi greinum sem koma frá öðrum löndum og hafa valið að búa og starfa á höfuðborgarsvæðinu í sínu fagi.
- 3) Ýmsum bakgrunnsgögnum var safnað frá sveitarfélögum á höfuðborgarsvæðinu og viðtöl tekin við lykilstarfsmenn á umhverfissviði og eigna- og atvinnuþróunarsviði Reykjavíkurborgar.

Rýnihóparnir voru settir saman í samstarfi við Bandalag íslenskra listamanna, Listaháskóla Íslands og kynningarmiðstöðvar skapandi greina (s.s. Hönnunarmiðstöð, Kvikmyndamiðstöð, CIA o.fl.). Þessir aðilar sendu lista yfir nöfn nemenda eða félagsmanna sinna sem tilbúnir voru til að taka þátt í rýnihópavinnu. Rannsakendur höfðu samband við einstaklinga af þeim lista af handahófi. Vegna ófyrirséðra ytri aðstæðna urðu rýnhópar færri en ráðgert var. Hver rýnihópafundur

<sup>&</sup>lt;sup>5</sup> Styrkleika, veikleika, ógna og tækifæris greiningu.

<sup>&</sup>lt;sup>6</sup> Tekur einnig til þeirra sem stunda nám í skapandi greinum.

varð þó um leið lengri en upphaflega var gert ráð fyrir. Aðferðafræðilega hefur fækkun rýnihópa þó ólíklega haft mikil áhrif, en ákveðin mettun (Merriam, 2009) varð strax ljós eftir tvo rýnihópa með starfandi listamönnum. Jafnframt var mikill samhljómur á milli rýnihópa meðal starfandi listamanna, rýnihópa nemenda LHÍ og viðtala við erlenda listamenn sem starfa hér á landi. Þessi samhljómur bendir til þess að gögnin fangi þá umræðu sem fram fer milli einstaklinga í skapandi greinum um viðfangsefnið og að innra réttmæti (Merriam, 2009) gagna sé gott.



Kostir rýnihópa eru að með því að mynda samtal á milli nokkurra einstaklinga myndast umræður sem eru líkari þeim sem verða í samfélaginu (Merriam, 2009). Með rýnihópum er jafnframt hægt að ná til fleiri einstaklinga en með viðtölum, án þess að persónuleg nálgun eigindlegra rannsóknaraðferða tapist. Með því að nota eigindlega aðferð stýra væntingar rannsakenda ekki niðurstöðum eins og ef notaður væri spurningalisti með fyrirfram skilgreindum spurningum og svörum, heldur er markmiðið að sjá aðstæður frá sjónarhorni viðmælenda.

Rýnihópar hófust á þann hátt að allir þátttakendur voru beðnir að punkta niður á sitthvort blaðið hvar þeir vinna og búa og lista upp kosti og galla beggja. Þessir punktar voru svo notaðir til að hefja umræður á milli þátttakenda, en stjórnendur komu aðeins inn í umræðuna ef hún var komin langt út fyrir efnið eða til þess að hvetja einstaklinga sem héldu sig til hlés til að taka þátt í umræðum. Líflegar umræður mynduðust strax og þó allir væri ekki ávallt sammála um einstök atriði var samhljómur mikill.

Erlendir viðmælendur sem starfa í skapandi greinum voru valdir á þann hátt að einstaklingar sem starfa í skapandi greinum voru beðnir um að benda á erlenda einstaklinga sem ynnu í greinunum. Viðmælendur voru svo valdir af þeim lista með það fyrir augum að velja einstaklinga með sem breiðasta reynslu. Til viðbótar bentu gögn sem safnað var í öðru samhengi, m.a. í viðtölum við einstaklinga starfandi í tónlist<sup>7</sup> og viðtöl um stuðningsumhverfi í skapandi greinum til þess að þau viðhorf sem fram komu væru nokkuð lýsandi fyrir viðhorf listamanna á Íslandi. Ytra réttmæti (Merriam, 2009) rannsóknarinnar virðist því gott.

<sup>&</sup>lt;sup>7</sup> Úttekt unnin fyrir Kraum tónlistarsjóð veturinn 2013.

Samtöl í rýnihópum og viðtöl voru tekin upp og afrituð orð fyrir orð til að auðvelda greiningu og koma í veg fyrir að einhverjir þættir úr samtölum og viðtölum færu forgörðum.

Markmið gagnaöflunarinnar var að skoða og greina þá þætti sem gerir höfuðborgarsvæðið eftirsóknarvert fyrir þá sem starfa í skapandi greinum. Greining á gögnum tók mið af fyrirframskilgreindri rannsóknarspurningu en greining var þó opin, það er fór ekki fram út frá fyrirframgefnum þemum. Þau þemu sem spruttu fram á þennan hátt voru það sem hér er kallað kalla "Þorpið", "Að fylla hús" og "Smæðin". Í ljósi viðfangsefnisins voru samgöngur og skipulagsmál fyrirsjáanlegri þemu en þau komu þó alfarið fram að frumkvæði viðmælenda.

Niðurstöður fyrir hvert af þessum þemum eru settar fram í niðurstöðukafla og eftir atvikum tengd við fræðilega umfjöllun. Samsvörun á milli niðurstaðna rannsóknar og fræðilegrar umfjöllunar er góð sem enn styður niðurstöður rannsóknarinnar.

Í ljósi þess meginmarkmiðs rannsóknarinnar að skoða og greina viðhorf þeirra sem starfa (og nema) í skapandi greinum er áhersla lögð á að rödd viðmælenda fái rými í skýrslunni. Í þessu samhengi eru beinar tilvísanir í einstaka viðmælendur settar fram í texta auk þess sem vísað er óbeint í einstök svör. Viðmælendum í rannsókninni var lofað nafnleynd, og eru tilvísanir því ekki nafngreindar og upplýsingar sem rekja mætti til einstaklinga í einhverjum tilfellum teknar út.

### Hlutverk og staða skapandi greina í hagkerfinu



Í kjölfar pólitískar áherslu á skapandi greinar í Bretlandi og Ástralíu undir lok tíunda áratugsins, hefur áherslan á "sköpun" (creativity) fengið byr undir báða vængi. Hugtök svo sem hin skapandi stétt (creative class<sup>8</sup>), skapandi borgir (creative city<sup>9</sup>),  $economy^{10}$ ), upplifunarhagkerfið (experience skapandi hagkerfi (creative economy<sup>11</sup>) (creative industries<sup>12</sup>) hafa litað skapandi greinar

 $<sup>\</sup>ensuremath{^8}$  Richard Flordia: The rise of the creative class. 2002.

<sup>9</sup> Allen J. Scott: Creative cities. 2006.

 $<sup>^{\</sup>mbox{\tiny 10}}$  Joseph Pine, James Gilmore: The Experience economy. 1999.

<sup>&</sup>lt;sup>11</sup> John Howkins: The creative economy. 2001.

<sup>&</sup>lt;sup>12</sup> Richard Caves: Creative industries. 2002.

stjórnmálaumræðu. Öll þessi hugtök byggja á því að hagkerfi hins vestræna heims hefur breyst mikið frá framleiðsluáherslunni sem áður var. Þó að nálgun þeirra sé ólík og skilgreiningar á sköpun (*creativity*) ólíkar eiga hugtökin það sameiginlegt að kjarni hugtaksins fangar listsköpun og rekstur byggður á sköpun. En til að skilja betur hlutverk og stöðu skapandi greina<sup>13</sup> innan hagkerfisins er rétt að skoða kenningar um orsakasamhengi nánar.

Hér á landi eru þegar vísbendingar um að horft sé til skapandi greina í nýju og stærra samhengi áður. Í því felst að litið er á þessar greinar sem sjálfstæðrar uppsprettu gæða, en ekki sem greinar háðar stuðningi. Ákveðin hætta er þó á að leggja um of áherslu á skapandi greinar sem vaxtarsprota. Í skýrslunni Skapandi greinar – sýn til framtíðar sem unnin var af starfshópi um skapandi greinar undir ritstjórn Ásu Richardsdóttur (2012), er lögð áhersla á að mótuð verði atvinnustefna sem byggi á jafnræði atvinnugreina. Með jafnræði atvinnugreina er átt við að stjórnsýslan taki mið af framþróun í atvinnulífi, þar sem atvinnustefna ætti m.a. að hafa að markmiði að fjölga störfum í vaxtagreinum og auka útflutning. Til að ná jafnræði í atvinnugreinum þyrfti að gera samanburð á því hvernig opinbert stoðkerfi þjónustar ólíkar atvinnugreinar, sem notaður yrði sem grundvöllur til jafnræðis milli nýrri og eldri atvinnugreina. Þá þyrfti stjórnsýslan að forgangsraða og leggja tímabundið áherslu á þær atvinnugreinar sem vænlegastar eru til vaxtar (Ása Richardsdóttir, 2012). Tillögur skýrsluhöfunda í þessu samhengi voru að efla verkefnatengda sjóði, menningarsamninga, vaxtarsamninga, og að rekstur menningarstofnana gegni þar lykilhlutverki (Ása Richardsdóttir, 2012, bls. 18). Jafnframt var tekið undir þær áherslur sem settar voru fram í Kortlagninu á skapandi greinum, að skapandi greinar séu meðal helstu vaxtargreina atvinnulífsins og mikilvægt að efla þekkingu og rekstrarskilyrði greinanna.

#### Skapandi greinar háðar stuðningi

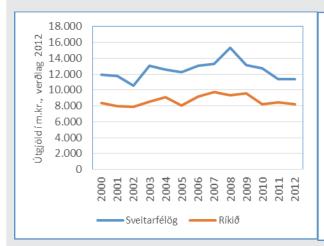
Í sögulegu samhengi hefur staða listar og menningar vera skilgreind sem háð öðrum þáttum í hagkerfinu. Neysla listar og menningar hefur verið skilgreind sem óþörf eða aukaneysla og styrkir til hennar verið háðir því að afgangur væri til fyrir henni. Á þeim rökum ætti efnahagssamdráttur að hafa mjög alvarlegar afleiðingar

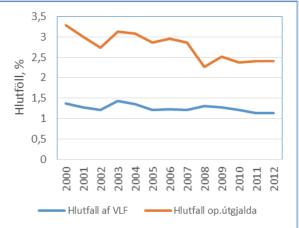
<sup>&</sup>lt;sup>13</sup> Skilgreining Richard Caves, 2000, byggir á því að kjarnastarfsemi byggi á menningarlegum, listrænum eða afþreyingarlegum gildum.

fyrir listir og menningu. Þegar að kreppir mætti með þessum rökum ætla að hvoru tveggja opinberir aðilar og neytendur forgangsraði útgjöldum og skeri niður "óþarfa" menningarneyslu. Út frá þessu sjónarhorni á listir og menningu ættu skapandi greinar á Íslandi að hafa dregist verulega saman í kreppunni og í kjölfar hennar.

### Rammagrein 1. Framlög hins opinbera til menningar og lista

Tölur Hagstofu Íslands um opinber útgjöld sýna að árið 2012 námu útgjöld hins opinbera til menningarmála alls 19,3 milljörðum kr. Sveitarfélögin stóðu fyrir tæplega 60% þessara útgjalda, eða 11,3 milljörðum kr.





Mynd 1. Útgjöld ríkis og sveitarfélaga til menningarmála

Heimild: Hagstofa Íslands.

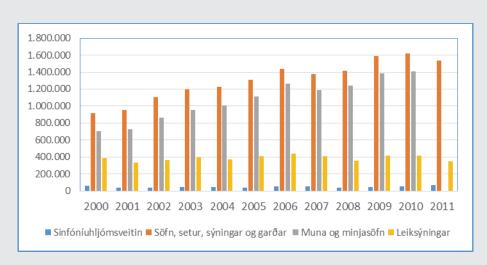
Mynd 2. Opinber útgjöld til menningarmála, % af landsframleiðslu og af opinberum útgjöldum. Heimild: Hagstofa Íslands.

Mynd 1 sýnir að opinber útgjöld til menningarmála á föstu verðlagi jukust verulega á árunum í aðdraganda hrunsins. En af hlutfallstölum í mynd 2 sést að útgjöldin héldu hvorki í við vöxt landsframleiðslu né opinberra útgjalda.

Eftir hrun hafa útgjöld hins opinbera til menningarmála dregist verulega saman. Tölur Hagstofu Íslands um opinber útgjöld á föstu verðlagi sýna samdrátt frá 2008-2012 sem nemur tæpum 5 milljörðum kr. eða um 20%. Samdráttur menningarútgjalda sveitarfélaganna nemur 26% og ríkisins 12%.

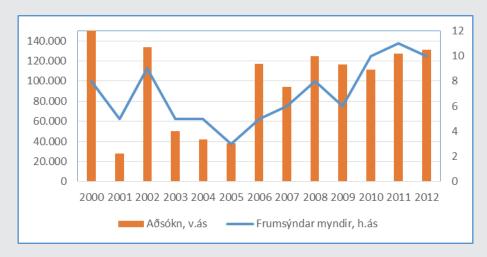
Verkefnasjóðir í skapandi greinum hafa verið minnkaðir til muna eða lagðir af.

#### Rammagrein 2. Menningarneysla.



Mynd 3. Aðsókn að völdum menningarviðburðum 2000-2011

Menningarneysla almennings virðist ekki hafa dregist saman á sama hátt a.m.k. fram til ársins 2011 en nokkur aukning hefur verið í aðsókn í leikhús og söfn, eins og sjá má á mynd 3. Þar sést að leikhúsgestum fækkaði aðeins árið 2008 þegar bankahrunið varð, en árin 2009 og 2010 var leikhússókn svipuð og á árunum fyrir hrun. Þá hefur tónleikagestum fjölgað í kjölfar bankahrunsins, samkvæmt tölum Hagstofunnar, og nokkuð stöðug aukning hefur verið í aðsókn safna. Hafa ber þó í huga að fjölgun safngesta tengist væntanlega fjölgun ferðamanna. Aukin aðsókn á íslenskar kvikmyndir bendir einnig til þess að stuðningur sé við innlenda menningu (mynd 4).



Mynd 4. Íslenskar kvikmyndir: Fjöldi frumsýndra mynda og aðsókn. Heimild: Hagstofa Íslands.

### Skapandi greinar sem vaxtarsprotar

Í pólitísku samhengi hefur áherslan á skapandi greinar undanfarið fyrst og fremst verið á fyrirtæki í skapandi greinum sem vaxtarsprota, greinar sem tekið geta við af eldra framleiðslukerfi. Þannig hefur tölvuleikjaframleiðslu meðal annars verið hampað fyrir mikinn vöxt og miklar væntingar verið til að aðrar greinar innan skapandi greina geti fylgt í kjölfarið. Að baki þessu liggur áhersla á að í breyttu hagkerfi sé vöxtur byggður á nýsköpun, afþreyingu og upplifun. Þetta telja Gabe, Florida og Mellander (2013) að endurspeglist í því að hin skapandi stétt varð síður atvinnulaus en aðrar stéttir í Bandaríkjunum í kjölfar efnahagssamdráttarins. Í Bretlandi eru jafnframt vísbendingar um að fyrirtæki í skapandi greinum hafi veðrað efnahagssamdráttinn betur en fyrirtæki almennt og vöxtur þeirra verið meiri en í öðrum greinum á undanförnum árum. DePropris (2013) telur það hugsanlega vera vegna þess að fyrirtæki í skapandi greinum eru yfirleitt mjög lítil og eiga þar af leiðandi auðveldara með að standa af sér samdrátt en stærri fyrirtæki sem eru viðkvæmari fyrir efnahagssveiflum.

Pá eru tímabundnar verkefnaráðningar algengar í skapandi greinum (Ball, Pollard, Stanley, & Oakley, 2010) og einstaklingar sem vinna innan þeirra færanlegri á milli verkefna. Önnur leið til að takast á við erfiðar efnahagslegar aðstæður er að taka á sig tekjuskerðingu. Sú tilgáta hefur einnig verið sett fram að innri hvatning listamanna og þörfin fyrir að skapa leiði til þess að þeir sætta sig við lægri laun en sérfræðingar með sambærilega menntun (Abbing, n.d.; Menger, 2006; Throsby, 1994). Þetta virðist þó ekki aðeins eiga við um listamenn, heldur um skapandi greinar almennt. Samanburður á launum sérfræðinga sem vinna í skapandi greinum og sérfræðinga með sömu menntun í öðrum greinum staðfesta þetta og gefa til kynna að laun í skapandi greinum séu lægri (Wetzels, 2007). Til viðbótar lágum launum er atvinnuöryggi einstaklinga í skapandi greinum lítið, mikið um verkefnaráðningar og margir vinna fleiri en eitt starf til að ná endum saman (Ball et al., 2010; Hesmondhalgh & Baker, 2010; Menger, 2006). Hesmondhalgh og Baker (2010) tóku viðtöl við einstaklinga sem vinna í sjónvarpi, tónlistarútgáfu og fjölmiðlun, og niðurstöður þeirra benda til þess að starfsmenn upplifi óöryggi og einangrun. Í tískuiðnaðinum í Mílanó er vinnudagurinn langur og laun lág, en þeir sem vinna þar segja engu að síður að vinnan sé gefandi og eru sáttir við sitt (Arvidsson, Malossi, & Naro, 2010). Mótsagnir eru því miklar í skapandi greinum.

Sveigjanlegur vinnumarkaður með verkefnaráðningum gerir fyrirtæki betur í stakk búin til að takast á við efnahagssveiflur. Ástríða þeirra sem vinna í skapandi greinum virðist einnig gera það að verkum að við atvinnumissi eru þeir líklegri til að skapa sér sjálfir verkefni ólíkt þeim greinum þar sem samdráttur leiðir til fjölgunar á atvinnuleysisskrám.

### Skapandi greinar skapa upplifun

pó að litið hafi verið til lista og menningar sem fjárhagslega háð öðrum hlutum hagkerfisins þá hefur mikilvægi samfélagslegs hlutverks listar og menningar verið viðurkennt. Menningarhagfræðingar hafa notað samfélagslegt mikilvægi listar sem rök fyrir fjárhagslegum stuðningi. Rökin hafa meðal annars verið notuð þegar kostnaður við uppsetningu verður meiri en raunhæft er að áætla í tekjur (Baumol's cost diseace) og eða þegar markaðurinn er illa upplýstur um listina en menningarlegt gildi hennar þykir engu að síður mikilvægt. Þannig leggja menningarhagfræðingar áherslu á að listir feli í sér ákveðin samfélagsleg gæði (public good) sem allir njóta óháð því hvort sem þeir greiði fyrir þau eða ekki. Með opinberum stuðningi er óbeint greitt fyrir þessi gæði (Frey, 2012). Ef áherslan í umfjöllun um skapandi greinar er á samfélagsleg gæði verða skapandi greinar í þjónustuhlutverki gagnvart samfélaginu, þar sem þjónustan felst í sköpun listar, listarinnar vegna (non profit) en ekki á fjárhagslegum forsendum (for profit).

Í þessu verður til ákveðin aðgreining milli listar listarinnar vegna og listar sem er sköpuð í rekstarumhverfi með fjárhagslegan hagnað að leiðarljósi. Þessi aðgreining er þó alls ekki alltaf svarthvít og mörg fyrirtæki í skapandi greinum leggja áherslu á að ógjörningur sé að greina á milli listar sem skilar fjárhagslegum hagnaði og þeirrar sem ekki stendur undir sér fjárhagslega. Flest fyrirtæki eru rekin á þeim forsendum að hluti verkefna standi undir útgáfu og framleiðslu annarra verkefna. Þannig verður hagnaður af einu verkefni í raun forsenda þess að koma óarðbærari list á framfæri (Nielsen, Power, & Sigurdardottir, 2009; Sigurdardottir, 2010). Fyrirtæki í skapandi greinum taka þannig á sig ákveðinn stuðning við listir, með því að koma á framfæri verkefnum sem ekki endilega skila fyrirtækinu hagnaði. Þetta er gert af ákveðinni listrænni hugsjón, en þeir sem upplifa listina (innlendir og erlendir) njóta góðs af.

Í samfélagslegum skilningi gegna skapandi greinar mikilvægu hlutverki í því að gera borgir og hverfi að eftirsóknarverðum stöðum að búa á eða. Skapandi greinar geta þannig myndað samkeppnisforskot landsvæða í gegnum upplifun. Þessi áhersla hefur komið fram hvoru tveggja undir formerkjum upplifunarhagkerfisins (Pine og Gilmore, 1999) og hagrænnar landfræði, og þá sérstaklega í gegnum áhersluna á skapandi borgir (Scott, 2006). Þá teygir þessi áhersla anga sína inn í ferðaþjónustu, þegar þær skapa innihald sem ferðaþjónusta byggir starfsemi sína upp í kringum (Markusen & Gadwa, 2010). Til dæmis hefur fagráð lista og skapandi greina hjá Íslandsstofu lagt áherslu á hátíðir og menningartengda viðburði og bent á það sem áhrifaríkustu leiðina til að laða að ferðamenn til landsins, ekki síst utan sumartíma (Ása Richardsdóttir, 2012, bls. 55).

#### List og menning sem innihald í ferðaþjónustu

Ferðamönnum til Íslands hefur fjölgað mikið undanfarin ár. Heildarfjöldi ferðamanna á Íslandi árið 2012 var 807 þúsund og er það 20% aukning frá 2011 (Ferðamálastofa, 2014). Áhrifaþættir á ákvörðun um að ferðast til Íslands hafa verið kannaðir af Ferðamálastofu. Árið 2012 var áhrifaþátturinn að sumri til íslensk náttúra í 79,7% tilfella, íslensk menning og saga í 38,6% tilfella og hagstætt ferðatilboð í 17,5% tilfella. Aðrir þættir höfðu minna vægi. Að vetri til var íslensk náttúra stærsti áhrifavaldur í 71,3% tilfella, íslensk menning og saga í 40,1% tilfella og hagstætt ferðatilboð í 36,8% tilfella. Þá voru erlendir ferðamenn fengnir til að velja hvar styrkleikar íslenskrar ferðaþjónustu liggi. Töldu um 70% allra ferðamanna hana liggja í náttúrunni og landslagi, rúmlega 30% í fólkinu og gestrisni, um 12% í afþreyingu og 11-12% í íslenskri menningu og sögu (Ferðamálastofa, 2012).

Dæmi um vaxandi grein ferðaþjónustu á Íslandi eru tónlistarhátíðir, en á landinu eru starfræktar margar tónlistarhátíðir sem eiga kost á því að þróast og verða aðdráttarafl fyrir innlenda sem erlenda ferðamenn (Tómas Young, 2013). Það er margreynt að tónlistarhátíðir um allan heim laða að fólk hvaðanæva af og hafa jákvæð efnahagsleg áhrif á hagkerfi viðkomandi staða eða svæða. Eins og bent er á í úttekt á tónlistarhátíðum á Íslandi (Tómas Young, 2013) getur samspil tónlistar og náttúru verið tækifæri í markaðssetningu. Tónlistartengd ferðaþjónusta gæti komið

ákveðnum svæðum og bæjum á kortið, þ.e. aukið hróður staðarins með auknum ferðamannastraumi á tónlistarhátíð.

Dæmi um slíka hátíð er *Aldrei fór ég suður* tónlistarhátíðin á Ísafirði. Hún byrjaði sem samfélagsmiðuð hátíð og var unnin frá grasrót. Hátíðin er upprunaleg (*authentic*), og endurspeglar sönn menningarleg gildi og samfélagið, eins og Hera Brá Gunnarsdóttir (2010) bendir á í rannsókn sinni um *Aldrei fór ég suður*. Helstu niðurstöður rannsóknar hennar voru þær að hátíðin hefði jákvæð samfélagsáhrif, jafnt félagsleg sem og efnahagsleg, en viðmælendur lögðu mun meiri áherslu á samfélagslegu áhrifin. Heimamenn hefðu til einhvers að hlakka yfir vetrartímann og hátíðin veitti fólki samkennd þar sem fólk komi saman. Ímynd Ísafjarðarbæjar hafi breyst og bærinn hagnast á hátíðinni auk þess sem hann hafi endurnýjað stimpil sinn sem tónlistarbær. Ekki hafi þó verið farið í neinar markaðsherferðir enda væri tilgangur skipuleggjenda með hátíðinni aðeins að hafa gaman af. Einnig sýndu niðurstöður að Ísafjarðarbær hafi ekkert gert til að meta efnahagslegan ávinning sem bærinn hlýtur vegna hátíðarinnar og mættu þeir styðja betur við hátíðina (Hera Brá Gunnarsdóttir, 2010).

Iceland Airwaves-hátíðin er stærsta og þekktasta tónlistarhátíð á Íslandi og laðar að sér mikinn fjölda erlendra og innlendra gesta. ÚTÓN hefur síðustu ár gert kannanir í kringum Iceland Airwaves með það að markmiði að fá yfirsýn yfir efnahagsleg áhrif hátíðarinnar. Erlendum gestum hefur fjölgað mikið á hátíðinni síðustu ár, og árið 2012 voru erlendir gestir í fyrsta sinn fleiri en Íslendingar á hátíðinni, eða 4.076 og hafði erlendum gestum þá fjölgað um 46% milli ára (Tómas Young, 2013). Velta erlendra gesta á Iceland Airwaves árið 2012 var mæld 802 milljónir króna, en kostnaður utan höfuðborgarinnar er ekki inni í þeirri tölu, svo sem ferðakostnaður gesta til Íslands. Ef sá kostnaður er meðtalinn vörðu þeir um 1,1 milljarði króna (Tómas Young 2013).

Forsenda þess að hátíðir á borð við *Iceland Airwaves* og *Aldrei fór ég suður* laði að ferðamenn er að hátíðirnar haldi uppruna sínum (*authenticity*) og laði að hvoru tveggja þá sem búa á svæðinu og ferðamenn (Hera Brá Gunnarsdóttir, 2010).

### Skapandi greinar flókið samspil listar og reksturs

Af framangreindu er ljóst að staða skapandi greina í hagkerfinu er flókin. Hluti skapandi greina er háður því að njóta styrkja. En á sama tíma skapa þær innhald fyrir atvinnugreinar, svo sem ferðaþjónustu, sem skilar samfélaginu tekjum. Fyrirtæki innan skapandi greina skila einnig tekjum og eru vaxtarsprotar sem virðast hafa staðið efnahagsþrengingar betur af sér en fyrirtæki í öðrum greinum. Að mati Andy Pratt prófessors við City University, London (2012), er of mikil einföldun að leggja áherslu á annað hvort vöxt eða styrki, heldur þurfi að skoða kerfið í heild sinni. Þetta samspil má meðal annars sjá í kvikmyndagerð á Íslandi undanfarin ár. Árið 2009 stóð kvikmyndageirinn frammi fyrir niðurskurði á framlögum til Kvikmyndasjóðs og fjármögnun íslenskra kvikmynda varð mjög erfið. Framlag innlendra kvikmyndasjóða er skilyrði fyrir umsóknum í erlenda kvikmyndasjóði. Íslensk framleiðsla kvikmynda var því í hættu á að minnka niður fyrir bá stærð sem barf til аð reka innlendan kvikmyndaiðnað. Kvikmyndagerðarmenn snéru vörn í sókn og lögðu mikla vinnu í að efla erlend tengsl og fá erlenda kvikmyndagerð til landsins. Sú vinna hefur skilað sér margfalt og ársvelta í kvikmyndagerð jókst um 249% frá 2010 til 2012 (munnleg heimild Hilmar Sigurðsson, 13.2.13). Stuðningur hins opinbera í formi endurgreiðslukerfis skipti hér vissulega máli, en þekking og færni innlendra aðila í kvikmyndagerð er þó forsenda þess að erlendir aðilar leiti hingað en ekki til annarra landa með sambærilega eða enn rausnarlegri endurgreiðslu. Í tilfelli kvikmyndagerðar fór betur en áhorfðist, en litlu hefði mátt muna að þessi þekking hefði tapast úr landi ef erlend kvikmyndaverkefni hefðu ekki komið til landsins hratt og örugglega. Lítil kerfi, eins og íslenska hagkerfið, eru viðkvæmari en stærri kerfi fyrir því að missa út lykilaðila. Ákvarðanir sem virðast einfaldar, eins og tímabundinn niðurskurður, geta til lengri tíma leitt til þess að sérhæfð þekking tapist úr landi, þekking sem hefur verið byggð upp á löngum tíma og kostnaðarsamt yrði að byggja upp aftur (Indergaard, Pratt, & Hutton, 2013).

### Skapandi greinar og höfuðborgarsvæðið



Landfræðilega byggjast skapandi greinar fyrst og fremst upp í og kringum stórborgir. Áhrifin eru bæði efnahagsleg og samfélagsleg og mikilvægt er að skoða skoða stöðu skapandi greina út frá hvoru tveggja í borgarfræðilegu samhengi. Það er mat Pratt (2012) að ef leggja á áherslu á skapandi greinar í atvinnusköpun og til að styrkja sérstöðu ákveðins svæðis á alþjóðlegum samkeppnismarkaði, sé ekki nægjanlegt að skoða skapandi greinar einhliða sem vaxtarsprota eða innihald fyrir ferðaþjónustu og upplifunarhagkerfið. Taka þurfi tillit til allra þeirra þátta sem lýst var hér á undan enda geti jafnvægið á milli þeirra oft á tíðum verið mjög viðkvæmt. Rannsóknir innan hagrænnar landfræði benda einnig til að hlutverk skapandi greina í borgarþróun sé ekki einfalt.

Mikið hefur verið gert úr hlutverki listamanna og sköpunar í að skapa eftirsóknarverð hverfi (Currid, 2007). Niðurstöður Stern og Seifert (2010) benda til að í hverfum þar sem list og menning er hlutfallslega umfangsmikil (cultural clusters), séu lífgæði meiri. En rannsókn þeirra bendir ekki til þess að beint samhengi sé á milli þess og hagvaxtar. Grodach (2011) hefur sýnt fram á að listrými (art spaces<sup>14</sup>) geti haft jákvæð samfélagsleg og efnahagsleg áhrif. Hann telur að með stuðningi við slík rými geti stjórnvöld lagt sitt af mörkum í uppbyggingu hverfa, en setur þann fyrirvara á að stjórnmálamenn hafa sjaldan þekkingu á listinni og hallist að lausnum sem geta nýst sem flestum. Til þess að listrými reynist vel, verði þau að vera á forsendum listarinnar og geti því ekki verið öllum allt. Sterk pólitísk áhersla á hlutverk listamanna og listsköpunar til að skapa eftirsóknarverð hverfi (qentrification) getur snúist upp í andhverfu sína þegar listamenn mótmæla pólitískum ákvörðunum um störf sín og aðstæður (Kirchberg & Kagan, 2013). Aðkoma opinbera aðila þarf þó ekki alltaf að hafa neikvæð áhrif og nefna má að í Japan hefur tekist að snúa "rauðu" hverfi í listamannahverfi með áherslu á listrými (Sasajima, 2013). Úttekt á starfsemi miðstöðvar fyrir menningu og þróun (CKU) sem sett var á laggirnar í Danmörku í kjölfar úttektar á upplifunarhagkerfinu, bendir jafnframt til þess að árangur hafi veri í samræmi við markmiðasetningu (Bille, 2012).

<sup>14</sup> Artist cooperatives, arts incubators, ethnic-specific art spaces, community arts or cultural centers.

Jafnvægi í átaksverkefnum í borgarskipulagi er viðkvæmt eins og rannsóknir Kirchberg og Kagan (2013) á Hamborg út frá sjálfbærni skapandi borga (*creative sustainable cities*) sýnir en Hamborg er bæði áhugavert dæmi um sjálfbærni og ósjálfbærni í borgarþróun.

Í Hamborg var pólítísk áhersla á að höfða sérstaklega til skapandi stéttar en sú áhersla leiddi til útilokunar, vaxandi mismunar og eyðileggingar á ákveðnum hverfum. Þessar aðstæður vöktu sterka mótspyrna frá grasrótinni (buttom-up network). Dæmi um þetta er hreyfingin Recht auf Stadt (RaS15). RaS eru grasrótarsamtök fjölmargra lista-, stjórnmála- og borgarþróunarsamtaka í Hamborg. Samtökin hafa mótmælt kröftuglega svokallaðri growth maschine og nýfrjálshyggjustefnu borgarinnar, þar sem megináhersla í borgarþróuninni hefur verið á efnahagslegan vöxt, og þar með minna vægi á félagslegan vöxt og skapandi lausnir fyrir borgina. RaS hafa bent á mikinn skort á húsnæði á viðráðanlegu verði í "booming entrepreneurial city", og ekki síst á erfiðar aðstæður fyrir listamenn að starfa í borg sem væri orðin alltof dýr. RaS gaf út stefnuyfirlýsingu sem kallaðist Not In Our Name, svokallað NION manifesto, sem vakti mikla athygli í umræðum um borgarþróun í Evrópu<sup>16</sup>. Hamborg er því gott dæmi um mikilvægi þess að borgarþróun sé sjálfbær; borgin vaxi á raunhæfum hraða, þar sem áhersla er lögð á félagslega samstöðu borgara um stefnu og þróun. Hamborg Kreativ Gesellschaft, sem vísað hefur verið til, er meðal annars viðleitni borgarinnar til að halda þróuninni áfram í samræðum og samstarfi við grasrótina.

Af þessu má sjá að áhersla á hagrænan ávinning skapandi greina hefur leitt til tvíbentra viðhorfa listamanna. Áherslan á skapandi greinar er jákvæð, en ef stefnan eru á forsendum stjórnvalda með áherslu á kostnaðarsamar fjárfestingar í húsnæði, getur viðhorf skapandi aðila auðveldlega snúist á öndverðan meið (Markusen og Gadwa, 2010). Samspil listarinnar og efnhagslegara áherslu er því viðkvæmt og oftar er litið til hinnar víðar skilgreindrar skapandi stéttar þegar efnahagsleg áhrif sköpunar eru skoðuð.

<sup>&</sup>lt;sup>15</sup> RaS hefur barist fyrir húsnæði á viðráðanlegu verði og rýmum fyrir starfandi listafólk, með róttækum aðgerðum eins og hústökuaðgerðum á húsnæði sem fjárfestar hafa keypt með það í huga að rífa það niður og byggja nýtt – húsnæði sem borgin hefur ákveðið að kaupa aftur og endurhugsa í samráði við RaS hlutverk húsnæðisins og svæðisins í heild.

 $<sup>^{16}</sup>$ Í stefnuyfirlýsingunni er það harmað hvernig listir og listafólk er misnotað sem skapandi afl (creative force) fyrir svokallaða entrepreneurial city.

Í borgarskipulagsmálum hefur útgangspunkturinn oftar en ekki verið hin skapandi stétt Richard Florida (2003)<sup>17</sup>. Hafa ýtarlegar kortlagningar verið gerðar skapandi stéttir, t.a.m. í Danmörku. Þar kemur fram að skapandi greinar leita fyrst og fremst í stærstu borgirnar, þó minni byggðir hafi með annarri sérstöðu getað laðað að einstaklinga úr hinni skapandi stétt (Kristina Varst Andersen & Lorenzen, 2007). Samkvæmt kenningu Florida sækist hin skapandi stétt í að búa í svokölluðum skapandi potti (creative centers). Þar safnast saman einstaklingar með þekkingu í hátækni, fræðum og listum. Samkvæmt kenningunni stuðlar hin skapandi stétt svo að efnhagslegum vexti, og styrkir þannig þau svæði sem hann býr á. Hópurinn sækist ekki eftir störfum í stóriðnaði, eða útfrá aðgerðum stjórnvalda til dæmis vegna skattaívilnana eða annarra slíkra hvata til að laða til sín fyrirtæki. Ákvörðunin virðist tekin einfaldlega vegna þess að fólk vill búa á svæðinu (Florida, 2003). Þá skiptir mestu máli að á svæðinu séu staðir eins og almenningsgarðar, bókasöfn, leiksvæði, hjólastígar, og margbreytileiki í upplifunum, að samfélagið sé opið gagnvart fjölbreytileika, og að fólk geti samsamað sig sem skapandi einstaklingar umhverfi sínu. Byggingar í ósamræmi við umhverfið, t.d. stórar íþróttahallir, hraðbrautir, verslunarmiðstöðvar þemagarðar eða sýningar á forsendum ferðaþjónustu eru ekki aðlaðandi fyrir bennan hóp skapandi fólks og geta jafnvel verið fráhrindandi (Florida, 2003, bls. 217).

Rannsóknir Andersen, Bugge, Hansen, Isaksen og Raunio (2010) virðast þó benda til þess að hin skapandi stétt á Norðurlöndum velji frekar búa þar sem vinnumarkaðurinn er tryggur en þar sem andrúmsloftið er í anda þess sem Florida lýsir. Þannig safnast hinar skapandi greinar að mestu fyrir í höfuðborgum Norðurlanda, en borgir sem mynda kjarna landssvæða (*regional centers*) laða einnig að og telja Anderson og félagar það að vera vegna þess að borgirnar séu hvoru tveggja í senn, borg og lítill bær. Niðurstaða þeirra er að áhersla Florida sé um of á ungt fólk í skapandi greinum á kostnað viðhorfa þeirra sem eldri eru og fjölskyldufólks. Þessar aðstæður virðast þó ekki aðeins eiga við um Norðurlönd, en

17 Skilgreining Ricard Florida á skapandi stétt:

Super creative core: vísindamenn sem vinna að nýsköpun í víðum skilningi.

Creative professionals: knowledge based workers.

Bohemians.

rannsókn Currid-Halkett og Stolarick (2011) í Þýskalandi sýnir að þó að kaffihús, sjálfstæðar bókabúðir, hjólastígar og önnur þjónusta séu mikilvæg skapandi greinum eru þau þó ekki ekki nægjanlegt skilyrði til þess að draga að skapandi einstaklinga, sjónræn gæði skipta miklu máli. Smit (2011) gerði rannsókn í Hollandi á vali einyrkja og lítilla fyrirtækja í skapandi greinum á staðsetningu. Í rannsókn hennar kom fram að sjónræn gæði skiptu mun meira máli við val á staðsetningu en fræðileg umfjöllun um efnið gaf til kynna. Þegar viðmælendur voru inntir eftir því af hverju sjónræna heildin væri svo mikilvæg komu fram tvennskonar rök; annarsvegar út frá viðskiptavinum en skapandi umhverfi var talið líklegra til að leiða til jákvæðari viðskiptavina. Hinsvegar út frá eigin þörfum, það er að umhverfið stuðlaði að sköpun, væri skapandi. Í rannsókninni valdi Smit (2011) fjóra staði í Hollandi sem allir áttu það sameiginlegt að fjöldi fyrirtækja í skapandi greinum var vel yfir meðaltali Hollands. Þessir fjórir staðir voru þó mjög ólíkir.

Mat á sjónrænum gæðum er því ekki einsleitt, enda myndi "eitt" rétt útlit leiða til andstæðunnar og falla undir hverfi sem væru yfirkláruð (overly complete) eða of áferðafalleg og lítið rými fyir hið óvænta. Þau gætu verið hvar sem er í heiminum, ekkert sem gerir nákvæmlega þessa staðsetningu einstaka. Hverfi sem "gætu verið hvar sem er" voru einmitt lýsingar á þeim hverfum sem viðmælendur hefðu alls ekki valið. Algengar lýsingar á skapandi umhverfi voru hinsvegar að það væri "heildrænt", dýnamískt, (progressiv, authentic, rugged, edgy).

### Tillaga að nýju svæðisskipulagi höfuðborgarsvæðisins

Í tillögu að nýju svæðisskipulagi höfuðborgarsvæðisins (Samtök sveitarfélaga á höfuðborgarsvæðinu, 2014) er að mörgu leyti horft til þessarar hugmyndafræði, til skapandi stétta og möguleika á borgarþróun. Þar er lögð áhersla á þéttingu byggðar á skilgreindum kjörnum þar sem gerð er krafa um þétta og blandaða byggð. Byggir það á þeirri staðreynd að borgargæðum sé erfitt að ná þegar byggðin er jafn dreifð og raunin er (Páll Hjaltason, 2013). Sérstakur kafli er um *aukna nærþjónustu*, en það hefur sýnt sig að íbúar vilja þjónustu inn í hverfin á meðan þróunin hefur verið sú að verslunarkjarnar myndist í útjaðri hverfa við stofnbrautir bílaumferðar. Þeirri þróun á að reyna að snúa við (Páll Hjaltason, 2013).

Í tillögu að nýju svæðisskipulagi er lögð áhersla á að styrkja almenningssamgöngur, sérstaklega á stofnleiðum. Mikil aukning hefur verið á notkun almenningssamgangna undanfarin ár og er nauðsynlegt að auka þá þjónustu við íbúa, og ekki síður við ferðamenn. Með bættum almenningssamgöngum væri til dæmis hægt að dreifa hótelbyggingum víðar, en hótelvæðingin í miðbænum hefur að einhverju leyti verið á kostnað íbúa. Hugmyndir um léttlestarspor, og svokallað hraðvagnakerfi (bus rapit transport kerfi) út í Hafnarfjörð og Mosfellsbæ eru á teikniborðinu. Einnig hefur Reykjavíkurborg komið að athugun á fýsileika hraðlestar frá Reykjavík til Keflavíkur. Þar með er íbúum og ferðamönnum gefnir fleiri og greiðari samgöngumöguleikar.

Reykjavíkurborg hefur látið kanna hvar og hvernig ungt fólk vill búa og niðurstöður sýna að ungt fólk vill helst búa miðsvæðis, í litlum íbúðum og gjarnan leigja, en þessum hópi hefur ekki verið sinnt í áratug (Capacent, 2014, Páll Hjaltason, 2013). Einnig sækist eldra og efnað fólk eftir að búa í miðbænum eins og þróunin hefur sýnt sig við Skúlagötu og Klapparstíg. Markmið Reykjavíkurborgar er að tryggja félagslegan fjölbreytileika, sem er hollur fyrir samfélagið í heild, ekki síst aðlaðandi fyrir hina skapandi stétt. Einstaklingar starfandi í skapandi greinum og hin skapandi stétt sækir í fjölbreytileika í umhverfi sínu, og umburðarlyndi í viðhorfum, einsleit hverfi laða síður að (Florida, 2002).

### Niðurstöður viðtala og rýnihópa



Pegar niðurstöður viðtala og rýnihópa eru skoðaðar heildstætt kemur skýrt fram að einstaklingar sem vinna í skapandi greinum sjá stöðu skapandi greina í hagkerfinu ekki sem einangrað fyrirbæri heldur sem hluta af samfélaginu með aðkomu að hagkerfinu með margvíslegum hætti. Viðhorf gagnvart aðgerðum stjórnvalda var oft á tíðum neikvætt og talið einhliða á forsendum stjórnvalda. Þrátt fyrir að skapandi greinum væri hampað sem vaxtarsprotum væri þeim oftar en ekki vikið til hliðar og vísað til niðurskurðar í t.d. listkennslu í skólakerfinu. Það var skoðun viðmælenda að í þessu fælist ákveðin skammsýni, þar sem listmenntun og áhersla á aðferðafræði listanna í skólakerfinu væru forsenda þekkingar og skilnings, sem væri forsenda vaxtar skapandi greina. Þetta kom meðal annars fram í áhyggjum af því að niðurskurður í tónlistarkennslu gæti til lengri tíma leitt til endaloka *Iceland Airwaves* tónlistarhátíðarinnar. En þrátt fyrir gagnrýni voru viðmælendur almennt

sammála um að það væri að mörgu leyti gott að búa á Íslandi og höfuðborgarsvæðinu, að margt væri að gerast í listum og menningu, og forsendur væru til þess að skapandi greinar gætu dafnað enn frekar á höfuðborgarsvæðinu.

Þau þemu sem spruttu fram á við greiningu á gögnum koma fram í eftirfarandi köflum: "Þorpið", "Að fylla hús" og "Smæðin". Í ljósi viðfangsefnisins voru samgöngur og skipulagsmál flokkuð í sérstök þemu, sem og menningarmunur sem greindur var í viðtölum við erlenda einstaklinga starfandi í skapandi greinum á höfuðborgarsvæðinu. Niðurstöður fyrir hvert af þessum þemum eru settar fram í eftirfarandi köflum og eftir atvikum tengd við fræðilega umfjöllun.

### Þorpið 101

Áberandi er að flestir vilja búa í 101 og 107, eins og annað ungt fólk í borginni sbr. kannanir borgarinnar (Capacent, 2014), þetta á sem sagt ekki aðeins við um skapandi greinar. Fólk var tilbúið að búa í færri fermetrum í þessum hverfum. Ástæður þessa voru nálægð við þjónustu. Eins og í litlum þorpum þarf yfirleitt ekki að fara langt til að sækja þjónustu, en eins og í öðrum þorpum hefur "kaupmönnum á horninu" fækkað. Fiskbúðarinnar á Freyjugötu var sárt saknað og viðmælendur vonuðu að Brynja á Laugavegi færi ekki sömu leið. Kostir þorpsins eru einnig félagsleg nálægð, því þar býrð þú í nálægð við vini og vandamenn. Þegar þú ferð út mætir þú kunnuglegum andlitum og heilsar nágrönnum á göngu og í verslunum.

Í þorpinu er **nálægð við náttúruna** líka mikil, en nauðsyn nálægðar við náttúru kom sérstaklega sterkt fram. Einn viðmælandi sagði hafið vera sitt "íbúfen" - að þegar hann fyndi að hann væri komin með axlir upp að eyrum af streitu í vinnunni tæki hann sér smá tíma til að horfa á hafið út um gluggann, sem kæmi í veg fyrir að vöðvabólgan næði yfirtökum. Nálægð við hafið kom fram sem mikilvægur þáttur bæði við val á búsetu og vinnuaðstöðu.

Skrifstofan [hefur] útsýnið yfir alla höfnina, Esjuna og yfir allt. Það er dásamlegt. Alveg í náttúrunni og fylgist með skipunum koma inn og út.

Nálægð við og útsýni yfir hafið kom fram í öllum rýnihópum og flestum viðtölum án þess að spurt væri sérstaklega um það. Virðist hafið gegna ákveðnu fagurfræðilegu hlutverki sem samræmist niðurstöðum Smit (2011) um mikilvægi sjónrænnar

uppbyggingar. Áhugavert var hversu sterk viðbrögðin við hafinu voru, en einn viðmælandi sagði að hann hefði ekki gert sér grein fyrir hversu mikilvægt það var honum fyrr en hann bjó erlendis um tíma inni í miðju landi, en það gæti hann ekki hugsað sér að gera aftur.

Til viðbótar við sjónrænt mikilvægi hafsins kom stærð húsnæðis einnig upp. Þar var sérstaklega talað um byggingu háhýsa sem voru sögð vera úr skala við mannfólkið, og nánast talin sjónræn ör (fyrir utan veðurfarsvandann sem þau skapa).

Viðmælendur, bæði íslenskir og erlendir, nefndu smæðina með þeim kostum sem taldir hafa verið upp, og nálægð við fjölskylduna, sem skapaði aðstæður sem væru ákjósanlegri en að búa erlendis.

To be perfectly honest, ... working here in a creative company doesn't even count for me as reason for being here. [...] It would be infinitely better for me being abroad. I live here because of my daughter. I want her to have a nicer childhood than if I was in London or New York or somewhere. When she is out of her earlier childhood, I don't know if that will be the case here.

I like living here because I just like the generous Icelandic attitute most of the time – well, I like being here for my soul.

Niðurstöður rýnihópa og viðtala fólks starfandi í skapandi greinum á höfuðborgarsvæðinu sýna að það sem fólk sækir í er þorpsstemmning:

Sjarminn við [götuna mína] er hugguleg þorpsstemmning, ekki eins og að búa í borg heldur þorpi. Húsin öll skökk og mismunandi, fólkið vingjarnlegt og maður labbar allt og mér líður eins og í litlu þorpi.

### Hafnarfjörður

Þó að miðbær Reykjavíkur og póstnúmerin þar í kring hafi verið mest áberandi í umræðu um val á búsetu og val á vinnustað þá kom Hafnarfjörður oftast upp sem annar valkostur sem hefði sömu einkenni þorpsins og miðbærinn.

Ástæðan fyrir því að ég flutti í Hafnarfjörðinn var sú að ég var að sækja í þorpsmenninguna. Höfnin og náttúran styrkir það og er rosalegur kostur.

Miðbærinn í Hafnarfirði þótti í veikara lagi og þegar Reykvíkingar kvörtuðu undan ferðamönnum vildu Hafnfirðingar gjarnan sjá fleiri ferðamenn í miðbæ Hafnarfjarðar til að halda lífi í kaffihúsum og styrkja miðbæinn. Það kom skýrt fram að Hafnarfjörður virtist hafa þá sérstöðu sem hópurinn sækist eftir, umfram önnur

svæði höfuðborgarsvæðisins. Eins og fram kemur í tilvísuninni hér að neðan þar sem viðmælandi segir að Breiðholtið, þrátt fyrir félagslega tengingu, höfði ekki til viðkomandi:

Ef ég hefði alist upp í Hafnarfirði væri ég örugglega löngu flutt þangað. En ég ólst upp í Breiðholtinu og ég fann alveg að það var ekki að gera sig að ég væri að flytja þangað aftur. Alla vega ekki í það hverfi sem ég var í.

Hafnarfjörður þótti þó heldur langt frá Reykjavík samgöngulega séð og þótti "synd að Hafnarfjörður skuli vera í Hafnarfirði" eins og einn viðmælandi orðaði það.

### Skipulagsmál

Sú skoðun kom upp í rýnihópum að meira samráð þyrfti að vera á milli sveitarfélagana á höfuðborgarsvæðinu í skipulagsmálum. Einn viðmælandi spurði af hverju öll sveitarfélögin þyrftu að byggja bryggjuhverfi. Í ljósi rannsókna Smit (2011) þá styrkir það ekki sköpun ef hverfi og bæjarhlutar verða of lík hver öðrum. Bryggjuhverfi missir þannig sjarma sinni ef þau eru of mörg og lík. Fagurfræðilega vantar meira samráð og samstarf, ekki síst í skipulagningu verslunarkjarna, en Korputorg var einmitt nefnt sem mesta andstæðan við það sem væri ákjósanlegt.

Í skipulagsmálum voru samgöngumál og uppbygging ferðaþjónustu þó mest til umræðu.

Mig langaði að flytja úr 101 vegna þess að mér fannst 101 vera ónýtur. Hann er bara fullur af ferðamönnum, túristabúðum og fyllibyttum.

Á meðan allir voru sammála um að ferðaþjónustan væri mikilvæg fyrir íslenskt samfélag þótti ókostur hversu staðbundinn hún væri. Vandinn væri í sjálfu sér ekki ferðamennirnir heldur skipulagið í kringum þá.

Það eru ekki túristarnir *per se* heldur allir þeir sem eru að reyna að græða á túristunum. Verið að rífa hús og byggja einhverjar risa blokkir. Eitthvað fólk sem hefur aldrei búið þarna. Ekki ferðamennirnir, þeir eru bara næs.

Með þessu framhaldi er hætta á því að ferðaþjónustan taki yfir miðborgina, til dæmis með því að byggja háhýsi sem ekki eru í skala við skökku og mislitu húsin í borginni. Miðborg Reykjavíkur tapi fagurfræðilegri sérstöðu sinni og falli í flokkinn "gæti verið hvar sem er í heiminum" (Smit, 2011).



### Samgöngur

Þegar rætt var um samgöngur kom bílavæðing Íslendinga fljótlega upp. Skipulag væri út frá bílum og nánast ómögulegt væri að stunda vinnu í öðru hverfi en maður byggi í án þess að vera á bíl. Þá værum við sálrænt mjög háð bílnum. Einstaklingur með rekstur í miðbænum sagði viðskiptavini oft nefna að það vantaði bílastæði, en viðkomandi benti á það væru næg bílastæði í miðbænum "bara ekki beint fyrir utan dyrnar hjá mér".

Að vera háður einkabílnum hafði líka áhrif á lífsgæði þeirra sem valið höfðu að búa fyrir utan miðbæinn. Kosturinn við Kópavog var til að mynda að hann væri mjög miðsvæðis (fyrir þá sem væru á bíl), en umferðaræðarnar, sem gera það að verkum að Kópavogur er miðsvæðis, valda stöðugum umferðarnið sem erfitt væri að flýja.

Fyrir einstaklinga sem búið hafa erlendis, og þá sérstaklega annars staðar á Norðurlöndum (og hafa jafnvel aldrei tekið bílpróf) skýtur þetta skökku við.

Kannski gæti ég tekið strætó eða eitthvað. En það er bara svo ömurlegt að gera það, þarf svo mikla skipulagningu og tekur tíma. Sparar ekki tíma, ekki á Íslandi.

Á meðan almenningssamgöngur eru yfirleitt fljótlegasti kosturinn í borgum erlendis eru þær ekki fyrsti kostur á höfuðborgarsvæðinu. Einn erlendur viðmælandi sem býr í miðbænum, en starfar í nágrannasveitarfélagi sagðist ekki sáttur við að vinna svo langt í burtu frá heimili sínu:

I have a daughter who is at *leikskóli* and I don't have a car, so I take her to school, and I have a very short period of time to get the bus to enable me to be [at work] and I can't work full work day because the bus and the whole journey takes almost an hour in total.

Þeir sem eru háðir strætisvögnum til að komast heim úr bíói geta til að mynda ekki farið í 10 bíó.

### Að fylla hús af lífi

Eins og fram hefur komið er oftar en ekki litið til skapandi greina sem innihald til að efla ferðaþjónustu eða lífga upp á hverfi. Þó að viðhorf viðmælenda til ferðamanna hafi almennt verið jákvætt, og ekki undan því kvartað að skapandi greinar væru aðdráttarafl fyrir ferðamenn, kom fram nokkur andstaða við að vera sett í þá stöðu að skapa innihald eða að vera "notuð" til þess að skapa aðstæður sem væru

aðlaðandi fyrir aðra; til þess að lífga uppá hverfi eða skapa aðstæður þar sem aðrir geta grætt pening.

Í rýnihópunum kom fram að opinber stuðningur við skapandi greinar væri oft mjög tengdur húsum sem fylla ætti af listum og menningu. Viðhorf eins viðmælanda við átaksverkefnum sem fælu í sér húsnæði var á þessa leið:

Það var tendens á tímabili þar sem var verið að segja frá hinum og þessum átaksverkefnum þar sem var búið að finna lókal. [...] það eru takmörk fyrir því, þú þarft að finna þinn ramma sjálfur, þú þarft að vita að þér sé treyst fyrir verkefninu en ekki að það er búið að setja þig inní boxið.

Orð Gríms Atlasonar framkvæmdastjóra *Iceland Airwaves* tónlistarhátíðarinnar, sem hann lét falla þegar Ríkisútvarpið birti frétt um að ÚTÓN, *Iceland Airwaves* og fleiri aðilar tengdir tónlist fluttu í húsnæði í eigu borgarinnar við Hlemm í nóvember 2013<sup>18</sup>, endurspegla bæði þennan ótta við að vera notuð í ákveðnum tilgangi, sem og þá umræðu sem undanfarið hefur verið í gangi um að einstaklingar í skapandi greinum væru "*afætustétt* ":

Bara svo því sé haldið til haga þá munu þeir greiða húsaleigu sem þarna flytja inn. Það hefur örlað á þeim misskilningi að borgin væri að gefa eitthvað - en svo er ekki. Þarna slær borgin tvær flugur í einu höggi - fær skemmtilega leigjendur sem lífga upp á svæðið og fær peninga í leiðinni.

Þessi staða er afar öfugsnúin í ljósi þess að skapandi greinar eiga oftar en ekki í húsnæðisvanda. Í rýnihópum kom fram að þegar til kastanna kæmi væru skilyrði sem sett væru við því að fá húsnæði til sköpunar oft svo þröng að ekki væri raunverulegt svigrúm til þess að skapa, til dæmis mætti ekki gera breytingar, jafnvel ekki negla nagla, eða "skíta út", jafnvel kæmi í ljós að aðrar forsendur væru fyrir því að fá húsnæði en væntingar hefðu verið til:

[...] þessar fix lausnir, það er búið að taka einhverja heljarinnar ákvörðun hér í að setja pening í nákvæmlega þetta[...] búið að fastsetja þetta lókal, og helst eitthvað sem tengist sjávarútvegi..., getið þið hannað það[eitthvað innan sjávarútvegs]?

<sup>&</sup>lt;sup>18</sup> Grímur Atlason, 27.nóvember, Facebook. Frétt RUV: Tónlist í stað bíla. 27.nóv. 2013.

Með þessu er vísað til þess að listamenn eru ekki hafðir með í ráðum, heldur er ætlast til þess að þeir taki þátt í þessum verkefnum á forsendum annarra, í dæminu hér að ofan á forsendum sjávarútvegsins.

Í skýrslunni *Skapandi greinar – sýn til framtíðar* (2012) er samantekt á framlögum sveitarfélaga til menningarmála árið 2010. Þar kemur fram að útgjöld til menningarmála fara að miklu leyti í rekstur húsnæðis; bókasafna, minja-, skjala- og náttúrufræðihúsnæðis eða menningarhúsa af einhverju tagi.

Eftir stendur þó vandi fyrirtækja í skapandi greinum að finna hentugt húsnæði fyrir rekstur sinn. Fyrirtæki í skapandi greinum eru oft lítil og hafa ekki uppi áform um vöxt eða fjölgun starfsmanna (Kreativwirtschaftsbericht für Hamburg, 2012). Þá eru oft miklar sveiflur í umsvifum fyrirtækjanna og þau eiga oft erfitt með að áætla verkefnastöðu og þörf fyrir starfsmenn langt fram í tímann. Fyrirtækin vaxa og minnka því til skiptis eftir verkefnastöðu og efnahagsástandi og algengt er að þessum sveiflum sé mætt með verkefnaráðningum. Þörf fyrir sveigjanlega vinnuaðstöðu þar sem hægt er að bæta við fermetrum og fækka er því til staðar hjá mörgum fyrirtækjum í skapandi greinum, en erfitt getur reynst að finna slíkt húsnæði:

[...] að finna húsnæði sem hentar fyrir starfsemi af stærðinni sem þú ert í- en þú ert að gera eitthvað sem þú veist ekki hvað er. Og meira að segja, þegar þeir sem eru eins og við sem erum bara tiltölulega establisheruð að vinna, þá er þetta þannig að þú veist ekkert fyrirfram hvað starfsemin þín getur orðið. Þú vilt kannski ekki fara með hana í stóra [stækka], því þú ætlar ekki að vera í þannig lífi. Eða þannig aðstæðum [...] það er erfitt að finna bæði staðinn, dótið og fólkið til þess að styðja við það.

Í ljósi þess að það eru fleiri einyrkjar og lítil fyrirtæki í sömu stöðu velti einn viðmælandi því upp af hverju það væri ekki til einhver aðstaða þar sem fleiri en einn í sömu aðstöðu gætu samnýtt aðstöðu. Af því gæti jafnvel skapast meiri samgangur og samlegð á milli fyrirtækja, jafnvel í ólíkum greinum. Í þessu samhengi kom upp Hugmyndahús Háskólanna<sup>19</sup>, sem starfrækt var um tíma í Reykjavík:

SÓKNARFÆRI SKAPANDI GREINA Á HÖFUÐBORGARSVÆÐINU

<sup>&</sup>lt;sup>19</sup> Hugmyndahús háskólanna var samvinnuverkefni Listaháskólans og Háskólans í Reykjavík, en þar gátu frumkvöðlar og sprotafyrirtæki fengið aðstöðu fyrir starfsemi sína og greiddu einungis lágmarksleigu. Hugmyndin var að leiða saman ólíka einstaklinga úr öllum atvinnugreinum og gefa þeim tækifæri til að skapa sér ný tækifæri.

Mig langar bara að öskra: Hugmyndahúsið [...] Þetta var eins ódýrt set-up og hægt var að hugsa sér til þess að rækta grasrót og hjálpa nýsköpun. Og á forsendum grasrótar [...] ekki virðiskeðja sem þurfti að uppfylla eftir einhverri formúlu sem er alls ekki skapandi.

Hugmyndahúsið virtist að einhverju leyti hafa komið til móts við skort á svokölluðu þriðja rýminu (third place); svæði sem hægt væri að sitja við vinnu, funda óformlega í afslöppuðu umhverfi. Til skamms tíma gátu nýstofnuð fyrirtæki fengið slíka aðstöðu í Hugmyndahúsi Háskólanna. Almennt var því ljóst að innan skapandi greina væri mikil missir af Hugmyndahúsinu. Ólíkt mörgum öðrum húsum töldu viðmælendur að Hugmyndahúsið hafi verið á forsendum þeirrar sköpunar sem fram fór í húsinu.

Annar þáttur í húsnæðisvanda skapandi greina felst í því að skapandi greinar leita í "hrátt" húsnæði með lága leigu – en það er húsnæði sem skilar eigendum oft litlum tekjum og lendir því gjarnan í niðurrifi eða enduruppbyggingu þegar staðsetning verður verðmætari (*gentrification*).

Breytingar í hverfaskipulagi, þar sem ódýr hverfi breytast í eftirsóknarverð og dýr svæði þýðir að skapandi greinar eru oft á hrakhólum. Viðmælendur töldu að hættan á því að missa húsnæði vegna staðsetningar minnki ef til vill að einhverju leyti ef húsnæði er í opinberri eigu en að aðkoma opinberra aðila skapi önnur vandamál.

Borgin [verður annað hvort] að taka meðvitaða ákvörðun um að þau [borgin] ætli að leyfa listamönnum að vera þarna en þá verður að vera jafnræðisregla og þarf að auglýsa, og þá getum við ekki endilega fengið þetta. Eða þá að það kemur eitthvað annað batterí sem getur borgað raunverulega leigu.

Einkaaðilinn sem átti þetta hús [vinnustofa listamanns] var vinveittur myndlist og leyfði myndlistarmönnum að vera þarna [...] síðan breyttist það allt í hruninu [...] maður er svoldið svona leiksoppur.

Hér kemur fram að einkaaðilar eru í annarri stöðu en hið opinbera þegar kemur að leigu enda geta þeir valið og gert upp á milli listamanna sem hið opinbera getur ekki gert. Stuðningur við einstaka listamenn gæti þannig orðið markvissari en ef stuðningur við listir er eingöngu opinber. Blanda af stuðningi einka- og opinberra aðila gæti þannig skapað fjölbreyttari stuðning við listir.

Fram kom að öruggt húsnæði skipti miklu máli, eins og í boði er til dæmis fyrir myndlistarmenn í gegnum SÍM húsnæði<sup>20</sup>. Sú aðgerð var almennt talin mjög jákvæð en gallinn væri hversu lítill innblástur fengist í því umhverfi, húsið væri að einhverju leyti illa nýtt, enda fáir myndlistarmenn sem hefðu efni á því að sinna myndlistinni eingöngu og stunduðu aðra vinnu lungann úr deginum. Í rýnihópum kom jafnframt fram að greinar, eins og myndlist, þrífast að miklu leyti á því að vera á tánum, á hrakhólum að fara á milli hverfa þar sem aðstaða er til uppbyggingar. Í þessu horfa listamenn ekki síður til uppbyggingar hverfa en stjórnvöld. En eins og fram hefur komið hafa erlendar rannsóknir sýnt að slík "hreinsun" getur snúist upp í andhverfu sína.

Sjóhó hverfið [Grandi]er kannski spennandi borgarhluti. En það er mjög hætt við því að þetta hverfi verði viðbjóðslega mislukkað og verði bara eitthvað svona túristalunda [fyllist af lundabúðum]. Af því það er verið að þrýsta of mikið á uppbygginguna en ekki verið að leyfa því að gerast á eðlilegan hátt.

### Smæðin

Kostir Reykjavíkur, og höfuðborgarsvæðisins, virðast bæði tengjast smæð Reykjavíkur og því að hún er höfuðborg. Hér er hvoru tveggja hægt að njóta allrar þeirrar menningar sem höfuðborg býður upp á en um leið ákveðinnar þorpsstemmningar sem smæðin skapar.

Reykjavík er höfuðborg Íslands og Ísland er eyja. Það þarf að vera menning, það þarf að vera ópera, það þurfa að vera tónlistarhátíðir, það þurfa að vera listasýningar og listasöfn og allt svoleiðis. Og það er ekki til í sömu [stærð], er ekki svo útbreitt í minni bæjum í stærri löndum.

Smæðin þýðir líka minni samkeppni og styttri boðleiðir sem gerir það auðveldara að koma sjálfum sér og sköpun sinni á framfæri.

Why did I come here to work? Well there is not much competition here. So, that gave pretty good marketing opportunities. Meaning, if I wanted to do this in a big city, what I was doing, it would have been much harder to get a foodhold or you know, to aim for the top than in a country like this where there wasn't much competition.

Vinnustofur Sambands íslenskra myndlistarmanna: SÍM leigir út vinnustofur til félagsmanna í húsnæði við Seljaveg 32, Nýlendugötu 14, Súðarvog 3 og á Korpúlfsstöðum í Reykjavík og Lyngási í Garðabæ, en vinnustofurnar eru hátt í 200 talsins. Vinnustofurnar eru allajafna fullnýttar.

Þá hafa listamenn á Íslandi talað um að nálægðin í sköpuninni leiði til þess að endurgjöf á verk fæst hratt og örugglega og það geri það auðveldara að þróa listina. Þetta á ekki síst við í tónlist en öflug grasrót er í íslensku tónlistarlífi.

Smæðin þýðir einnig að sérhæfing einstaklinga er minni sem hefur bæði kosti og galla. Minni sérhæfing og það samstarf milli greina sem skapast af smæðinni getur leitt til nýsköpunar og þróunar, sem ef til vill verður ekki í stærri samfélögum. En á móti kemur að erfiðara er að byggja upp þá færni sem fæst með mikilli sérhæfingu, eins og fram kom í viðtölum fyrir skýrslu um stuðningsumhverfi skapandi greina. Smæðin hefur því bæði kosti og galla; smæð fyrirtækja og sveigjanleiki gerir þeim auðveldara að bregðast við efnahagslegum breytingum, en um leið gerir smæð markaðarins í heild skapandi greinar viðkvæmari fyrir efnahagssveiflum. Lítið þarf til þess að rekstrarforsendur breytist verulega og þekking horfið úr landi eins og kvikmyndagerðarmenn óttuðust mjög er kvikmyndasjóður var skorinn niður. Vegna smæðarinnar og tenginga á milli greina innan skapandi greina verða skapandi greinar í heild viðkvæmari fyrir miklum samdrætti og eða niðurskurði í einstaka greinum.

### Menningarmunur

Á höfuðborgarsvæðinu starfa margir í skapandi greinum erlendis frá, sérstaklega í tónlistar-, kvikmynda- og tölvuleikjagreinum. Erlendir einstaklingar starfandi í skapandi greinum á höfuðborgarsvæðinu telja kosti þess að lifa og starfa þar samsvara að miklu leyti framkomnum viðhorfum Íslendinga. Smæðin geri það auðvelt að búa og vinna á svæðinu, tengslanet er þétt, boðleiðir stuttar og vandamál því oft fljótleysanleg. Þá kom fram að hvatvísi væri einkennandi í umhverfinu og ákvarðanir teknar snöggt. Einn viðmælandi orðaði það svo:

It was the accessibilty of doing anything I liked, it was a kind of "pre-grass can do" attitude about just: why just you don't do that? [...] People are really willing to share here and help each other and all that, and coming from London that is very different.

Viðmælendur gátu bent á ýmislegt í starfsumhverfinu sem hefur komið þeim á óvart miðað við það starfsumhverfi sem þeir voru vanir frá öðrum löndum. Til dæmis var nefnt að ef skuldbindingar hvað varðar tímasetningar, fundarboð og afhendingar á pöntunum stæðust ekki, væri því oft ekki tekið mjög alvarlega:

Viðmælendur bentu á að vissulega væru margir kostir við smæð samfélags og markaðar og þétta tengslanetið, en ókostirnir við það væru hversu mikið persónlegt líf einstaklinga blandast vinnunni, sem hefði áhrif á afköst:

It is a very conversational environment and you spend as much time chatting with people as you do focusing efficiently on work. You answer your cellphone during the office hours, you do not do that in other countries. You check Facebook, you do personal e-mails. That is an accepted part of the culture. So 45% efficiency, I am being quite liberal with that number, I think it might not even be that in a lot of places.

I had come from creative companies in London where you did not survive if you did not behave in a very cut like business like manner. So I found that really interesting [here].

Lokaorð eins viðmælanda samræmast vissulega því sem Íslendingar tóku líka fram í sínum skoðunum almennt á starfsumhverfi og búsetu:

We try not to do too much business here. But I like living here.

### Vaxtar- og sóknarfæri höfuðborgarsvæðisins



Þegar niðurstöður rýnihópa og viðtala eru skoðaðar og bornar saman við erlendar rannsóknir er ljóst að höfuðborgarsvæðið hefur upp á margt að bjóða sem laðar að einstaklinga í skapandi greinum, þrátt fyrir að rekstrarumhverfi í íslensku efnahagslífi sé ekki talið ákjósanlegt.

Smæðin hefur bæði kosti og galla og töluverðir möguleikar eru fyrir höfuðborgarsvæðið að byggja á þeim kostum sem smæðin hefur, til að mynda með því að byggja upp kjarna þar sem einstaklingar úr mörgum greinum geta komið saman og unnið saman. Það er þó mikilvægt að hafa í huga að til að opinberar aðgerðir skili árangri þurfa þær að vera unnar í samráði við grasrótina.

Fyrirtæki í skapandi greinum eru oftast lítil og reiða sig mjög á einyrkja í rekstri. Mikilvægt er að byggja upp umhverfi þar sem stuðningur við lítil fyrirtæki og einyrkja gerir þeim kleift að vinna við list sína. Einstakingar sem hafa menntað sig í listum eru oft illa upplýstir um rekstur og skattamál. Þó að skattamál séu mál ríkisins kemur það ekki í veg fyrir að höfuðborgarsvæðið komi að fræðslu um

réttindi og skyldur einyrkja og lítilla fyrirtækja. Uppbygging fræðslustarfs mætti samþætta milli fleiri en einnar greinar innan skapandi greina og þá ef til vill í samstarfi við ÚTÓN sem hefur þegar byggt upp öflugt fræðslustarf.

Aðgengi fyrirtækja í skapandi greinum að styrkjum er oft takmarkað þar sem þau uppfylla ekki kröfu um nýnæmi. Þá verða opinberir styrkir að gæta jafnræðisreglu og styðja ekki einstök fyrirtæki í innlendri samkeppni. Með því að efla styrki einkaaðila samhliða styrkjum hins opinbera aukast möguleikar fyrirtækja í skapandi greinum.

Þá er einnig ljóst að álagið á miðbæinn er mikið og ákveðin hætta á því að hröð uppbygging á svæðinu, sem og áhersla á ferðaþjónustu gæti haft alvarlegar afleiðingar til framtíðar. Þar sem ferðaþjónustan, sem er um margt lík hvar sem er í heiminum, þurrkar út sérstöðu miðborgar Reykjavíkur.



Með því að bæta samgöngur og dreifa ferðamannastraumi á fleiri staði í borginni er hægt að byggja upp líflega þorpsstemmningu á fleiri stöðum á höfuðborgarsvæðinu. Í því ljósi virðist Hafnarfjörður hafa ákveðið forskot, en með léttlestarsamgöngum milli Hafnarfjarðar og miðborgarinnar (jafnvel tengt Keflavíkurflugvelli), væri hægt að "færa" Hafnarfjörð nær miðborginni. Þar gæti því auðveldlega myndast nýr skapandi kjarni, sem um leið gerði bæinn eftirsóknarverðari fyrir ferðamenn.

Ljóst er að einstaklingar í skapandi greinum hafa sterkar skoðanir á því hvaða hverfi hafa þau sjónrænu gæði sem draga skapandi greinar að (í miðbæ Reykjavíkur skiptir miklu máli að sjá hafið). Með því að skoða höfuðborgarsvæðið betur úr frá sjónrænum gæðum, og byggja á sérkennum hvers hverfis mætti gera fleiri hverfi en 101 eftirsóknarverð.

Í aðgerðum sem ætlað er að efla skapandi greinar á höfuðborgarsvæðinu er mikilvægt að hafa samráð við þá sem málið varðar. Hér hefur verið farið yfir þau atriði sem fram komu í rýnihópum, en eitt af því sem kom sterklega fram var óþolinmæði gagnvart pólitískum yfirlýsingum um mikilvægi skapandi greina, sem þó skiluðu stuðningi sem ekki væri á forsendum skapandi greina og niðurskurði í styrkjum.



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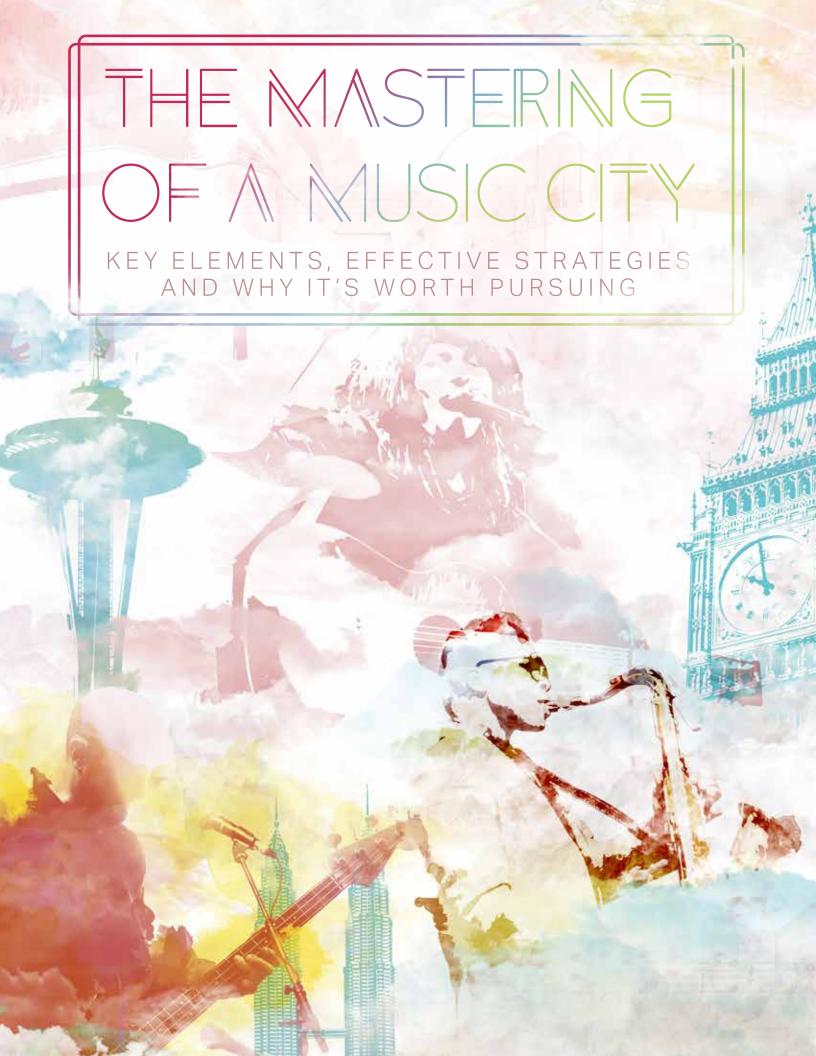
### Mastering Music City



### **BENEFITS**

- ECONOMIC IMPACT
- MUSIC TOURISM
- CITY BRAND BUILDING
- CULTURAL DEVELOPMENT & ARTISTIC GROWTH
- STRENGTHENING THE SOCIAL FABRIC
- VALIDATING MUSIC AS A RESPECTED & LEGITIMATE INDUSTRY
- ATTRACTING & RETAINING TALENT & INVESTMENT OUTSIDE OF THE MUSIC INDUSTRY





### Presented by:





In association with:









We are delighted to present this report to you, our colleagues in music, government and business worldwide, on behalf of IFPI and Music Canada.

A Music City, by its simplest definition, is a place with a vibrant music economy. There is growing recognition among governments and other stakeholders that Music Cities can deliver significant economic, employment, cultural and social benefits.

While music takes centre stage in this study, the findings and recommendations are relevant to almost anyone in the broader community. Are you looking to draw tourists to your city? Attract tech firms and the bright, young people they employ? Build your city's brand? Think music!

This report is intended as a "roadmap" to help you tap into the power of music. It applies to communities of all sizes, no matter how far along the path they are to realizing their full potential as a Music City.

The findings draw upon an exhaustive review of existing information and research, more than 40 interviews with a wide array of experts in music and government on all continents, and two international focus groups.

We are grateful to the many people who gave willingly of their time and ideas in the research for this report.

It is our hope that this report inspires you to build a Music City in your community or to make your Music City stronger than ever. We are confident that the information and recommendations in this report will help you get there.

Yours in Music.

Frances Moore
Chief Executive Officer, IFPI

Graham Henderson
President & CEO , Music Canada

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### SECTION INTRODUCTION

his report is intended as a universal "roadmap" to create and develop Music Cities anywhere in the world. The strategies and recommendations outlined here are designed to be flexible in recognition of local variations in music, culture, economies and political structures. They can be applied equally to well-established Music Cities seeking to further enhance their music economies and to nascent, aspiring Music Cities. They are relevant to communities both large and small.

The term "Music City" is becoming widely used in cultural communities and has penetrated the political vernacular in many cities around the world. Once identified solely with Tennessee's storied capital of songwriting and music business, Nashville, Music City now also describes communities of various sizes that have a vibrant music economy which they actively promote. Alliances are being formed among cities that see value in partnering to enhance their music success, Music City accreditations are being discussed and defined, and Music City panels are popping up at conferences around the globe. Outside the cultural community, there is growing recognition among governments and other stakeholders that Music Cities can deliver significant economic and employment benefits beyond the long-acknowledged cultural and social benefits. Quite suddenly there is a lot of interest in becoming a Music City, and how to make one succeed.

Following the 2012 publication of a report by Music Canada, "Accelerating Toronto's Music Industry Growth: Leveraging Best Practices from Austin, Texas," leaders in other cities began asking for their own "roadmap" so that they too could tap into the power of music. The curiosity spread to IFPI, Music Canada's international counterpart, and to diverse communities such as Kuala Lumpur, Malaysia and

Tempere, Finland. There was clearly a desire for effective Music City strategies and best practices that could be applied to any community, anywhere in the world.

What follows is a report written principally for music community experts as well as political leaders and government officials. While it is envisioned as a source of inspiration and information for almost anyone interested in building a stronger, more vibrant community, the findings will be of most practical use to: (i) professionals in the music industry including venue owners, concert promoters, music festival organizers, music managers and agents, record label executives, artists and music industry associations; (ii) politicians at the local level, but also at the regional and national levels; (iii) government officials involved in economic and/or cultural development at the local level, but also at the regional and national levels; and (iv) tourism and business leaders looking for ways to enhance local economies.

How each city defines success will vary. Some cities have set very ambitious goals for the delivery of economic, cultural and other benefits. For others, it comes down to creating a sustainable environment for music creation, for the sake of music, pure and simple. "One of the things that would be a really good measure," says David Grice, Managing Director of Musitec, a music, technology and creative industry cluster in Adelaide, South Australia, "is listening to a child telling their mom and dad that they want to be in the music industry and parents not saying, 'you need to get a real job.' That would be a great sign of success."

In a similar spirit, this report does not attempt to establish a benchmark for Music Cities or otherwise codify success. Rather, it provides a comprehensive framework of best practices to help you achieve your Music City goals, however you may define them. The best practices are outlined in detail in section V along with specific, practical recommendations that can be put to use by readers.

This report has been prepared principally with the commercial music sector in mind. While many of the cities researched for the report have strong traditions of classical, choral and other non-commercial music that deliver great benefits, we have not investigated those segments in depth. However, many of the strategies recommended will also benefit these segments of the music community.

### METHODOLOGY

Much has been written about individual Music Cities, providing a great deal of thoughtful material for the research team's initial global scan. This preliminary research helped us develop a larger list of cities to investigate beyond "the usual suspects." We sought to include both well known Music Cities as well as cities that are aspiring to advance their music economies. It was also vital to present a diversity of locations spanning the globe.

To obtain first hand accounts from these cities, we conducted more than 40 in-depth, one-on-one interviews with music association leaders, music entrepreneurs including publishers, promoters and artists, municipal employees from music offices and cultural departments, tourism promotion experts and investment and economic development specialists. Each individual responded to wide-ranging questions about the key challenges and opportunities in their cities. This provided a framework for the third phase of our research – two international focus group sessions. The focus groups were led by Erik Lockhart of the Queen's Executive Decision Centre at Queen's University in Kingston, Canada. Participants joined both by phone and online. The focus groups helped verify and expand upon the initial findings and identify the most important Music City

elements, benefits and strategies.

We are grateful to the many people who gave willingly of their time and ideas in the research for this report. The enthusiasm of the focus group participants, in particular, suggests that there is a great deal of interest in further exchanges of ideas and best practices among Music Cities around the world.

## SECTION II EXECUTIVE SUMMARY

here is nothing like music as a means to connect people, bridge linguistic and cultural divides and provide an avenue for identity and expression. Music is a transformative experience.

Collectively, the music ecosystem generates rich social, cultural and economic benefits.

Cities are increasingly assigning importance to these advantages and working with their music communities to accelerate the growth of the music economy, and identify and eliminate barriers. Small or large, they have the potential to become Music Cities.

This report identifies the essential elements of Music Cities, details the benefits they generate, and describes the most effective strategies Music Cities employ to enhance their music economies. It provides a "roadmap" for music community leaders, as well as officials and elected office holders to develop a comprehensive music strategy for their municipality. These recommendations can be scaled to communities of any size; however, for the purpose of this report we will use the term "Music City."

### MUSIC CITY KEY FLEMENTS

The essential elements of Music Cities are:

- Artists and musicians;
- A thriving music scene;
- Access to spaces and places;
- A receptive and engaged audience; and
- Record labels and other music-related businesses.

It is also important to have multi-level government

support for music, a broader city infrastructure conducive to the sector, and music education programs. Many other beneficial elements were identified in the research for this report including music history and identity. However, the above-noted components received a higher ranking by the focus groups conducted for this study.

### MUSIC CITY BENEFITS

A vibrant music economy drives value for cities in several important ways: job creation, economic growth, tourism development, city brand building and artistic growth. A strong music community has also been proven to attract other industrial investment, along with talented young workers who put a high value on quality of life, no matter their profession.

### MUSIC CITY STRATEGIES

The strategies offered in this report are based on research gathered from dozens of cities around the world. The following strategies are the ones most often cited as an effective means to grow and strengthen the music economy.

Key Strategies:

### 1. Music-friendly and musician-friendly policies

Government policies have a direct impact on the ability of music businesses such as live performance venues, recording studios and rehearsal spaces to operate sustainably. Business licensing, liquor licensing, transportation planning and parking, as well as land-use planning all have an impact on the health of the music economy. Compliance requirements

should be appropriate without becoming a barrier to doing business. Many communities face challenging decisions regarding land-use planning as a result of gentrification and urban growth. In some cities, historically significant music properties are threatened or have already been lost. Solutions to these challenges include heritage designations, cultural zones and policies based on the "agent of change" principle.

Similarly, musicians, singers, songwriters and producers can be helped or hindered by the government policy environment. Successful Music Cities create a supportive environment for artists so that they can focus on doing what they do best: making music. Support can be in the form of training and education programs, mentoring, access to hubs or incubators and affordable housing.

### 2. A Music Office or Officer

Navigating the broad range of government policies and regulations that impact music can pose significant challenges for music communities. Cities that have established a single point of contact for the music community, in the form of a music office or officer, are better positioned to build their music economy and develop effective policies. Music offices typically lead city music strategy development and mediate conflicts that arise between music businesses and the larger community. Music officers most often have prior experience in music or another creative sector that gives them invaluable sector knowledge.

### 3. A Music Advisory Board

Music Advisory Boards or Commissions provide an invaluable link between the music community and City Hall. Advisory Boards are typically composed of representatives from a broad cross-section of the music community, but also often include professionals engaged in related industries such as tourism and

economic development. They are also an ideal forum for the music community to develop internal consensus on issues, and provide advice on the legislative and regulatory environment.

### 4. Engaging the broader music community to get their buy-in and support

The involvement of the people most affected by music strategies is critical to the success of a Music City. Collaboration across the different segments of the music community doesn't always come naturally as the sector is composed primarily of small and medium-sized businesses. Many operators of these businesses wear various hats, work only part-time in music, and struggle just to make a living. However, evidence shows that cooperation and collaboration across the sector can lead to significant improvements to the regulatory and business environments, and are also the most effective means of gaining support from political leaders.

### 5. Access to spaces and places

Music needs a home; in fact, it needs many homes. From education to rehearsal to recording to performance, Music Cities require a variety of quality spaces and places to succeed. To meet this need, the first step is to take inventory so that gaps can be identified. For live performances, a full range of venues is essential to support artists as they advance through their careers – everything from small basement venues to stadiums and all points in between. Frequently, venues and other music businesses cluster together, enhancing their success. Hubs and accelerators are also proving to be very effective in different cities around the globe.

### 6. Audience development

Demographics play an important role in audience development; in particular, large student populations are identified as an advantage in many Music Cities. All-ages events can help engage younger audiences, thereby encouraging youth to develop a lifelong relationship with music. Factors like a community's proximity to other music markets, transportation links and promotion of live music events influence audience development. A common challenge is building an audience for local performers, who often fall under the shadow of high profile global stars.

### 7. Music tourism

Music tourism benefits cities to the tune of billions of dollars each year. Tourism assets include a city's year-round live music scene, music festivals and historical music landmarks. A few cities have developed comprehensive music tourism strategies that involve music-based branding, promotional campaigns, wayfinding apps and other social media strategies, investment in music infrastructure and signage, and programming. Accurate measurement of music tourism is a common gap since it is normally grouped with cultural tourism.

# SECTION III KEY ELEMENTS OF A MUSIC CITY: THE FULL SCORE

### WHAT MAKES A MUSIC CITY?

"The combination of having an active, thriving music scene with artists, bands, venues, education, etc. and support from the public, media, government and business."

 Michael Blair, The House of Songs and Scorpio Music Production, Stockholm "Each city and town is different. A successful Music City contributes strongly to the grassroots music scene, and generates value to the local economy and community as a whole."

- Tom Kiehl, UK Music, London

There is no strict definition of a Music City. Nevertheless, the most successful Music Cities have certain elements in common. Participants in two focus groups conducted for this study identified the following five elements as the most **essential** components of a true Music City:

- Artists and musicians;
- A thriving music scene;
- Access to spaces and places;
- A receptive and engaged audience; and
- Record labels and other music-related businesses.

Focus group participants identified three other elements as **important**:

- Multi-level government support for music;
- Broader city infrastructure; and
- Music education.

They also named elements that are often found in Music Cities, including:

- Music history and identity;
- Music tourism;
- Recognition of music as an economic driver;
- Strong community radio supporting local independent music; and
- A distinct local sound or sounds.

The principal elements are explored below.

Virtually every city, no matter how thriving its music community, has areas of strength and weakness. Austin, Texas, the "Live Music Capital of the World," has virtually no representation from major music labels. London, UK is a hotbed of live music, but has failed to prevent the loss of iconic venues. Kuala Lumpur, Malaysia and Johannesburg, South Africa can fill stadiums for international superstars, yet struggle to draw smaller audiences to see local artists.

What is most important is to accumulate a critical mass of essential and important elements, and to continually advance them. Current and aspiring Music Cities leverage their music strengths and pursue opportunities to develop others.

### THE ESSENTIAL FLEMENTS

### **Artists and Musicians**

It might seem obvious, but a Music City needs people who make music. Musicians, singers, songwriters and producers are a necessary foundation. Many cities report that artists congregate "organically." In other words, a strong gathering of artists cannot be manufactured, though implementing "musician-friendly" policies, as outlined in section V.1, is important to attracting and retaining them.

### A Thriving Music Scene

"Austin assumed the self-proclaimed title of Live Music Capital of The World in 1991. Live music is available for consumption at any time, any day of the week. From the airport, to grocery stores, to City Council meetings, music is embraced in Austin on an unparalleled level. An astonishing 250 or so places present live music here, and every style is represented."

- Don Pitts, Music Program Manager, City of Austin

A Music City is invariably built on a thriving live music scene. This means more than just having a large number of live performances. It means having a diversity of music offerings, as well as support for local and indigenous cultural expression, in addition to support for larger touring acts. Ideally, there is a balance between local artistic expression and international content.

### Spaces and Places

Spaces and places for live music performance and other activities such as rehearsing, recording and music education are integral to the success of a Music City. The range of music venues should span informal to formal, indoor to outdoor, and all sizes in order to meet the needs of artists at every point of their career. Quality is important, though, as Mark Davyd, CEO of Music Venue Trust in the UK points out: "If a 16 year old goes into a venue with terrible sound and lighting, does it motivate them to make it a career? Not likely."

### A Receptive and Engaged Audience

"Music fans here are assertive, informed, dedicated, passionate about music, and support artists in a big way. We have an informed, dedicated, passionate media, and a city that recognizes the importance of these things."

 Mike Tanner, Music Sector Development Officer, City of Toronto

An informed and passionate audience is critical for a successful Music City. Ideally, audience support extends to local musicians as well as touring artists, and fans are willing to pay for performances by artists at all levels in their careers, and representing a diverse range of influences. Attention should be paid to growing an audience of younger music fans.

### Music-Related Businesses

"The music industry starts with the artist but is not only about the artist. An infrastructure and network of people grows around an artist and furthers their career... A robust industry creates employment in all areas of music from its creation, to performance, to distribution and promotion."

- Martin Elbourne, UK music promoter

A critical mass of music-related businesses and professionals is essential to the success of a Music City, but it is not uncommon to have gaps within this category and still succeed overall. Nashville proudly describes itself as a "self-sustaining music centre" where it "is entirely possible to write, produce, record, release and promote an album without looking outside the Nashville region." In contrast, other cities have identified gaps in their inventory that they are working to address.

### OTHER IMPORTANT FIFMENTS

### Multi-Level Government Support for Music

The most successful Music Cities benefit from cooperative efforts by all levels of government, with engaged and supportive political representatives. The best example of this is in Australia, where coordinated action at the federal, state and local levels supports and grows the music industry. The State of New South Wales, for example, eliminated the

special licence needed by venues to host live music in 2009<sup>3</sup>. This significantly reduced red tape, which laid the foundation for the development of four local council music action plans including the most recent which was endorsed by Wollongong City Council<sup>4</sup>. The National Live Music Office, established in 2013, supports the development of local government policies pertaining to live music, live venues and audience development at the local level as well as advocating for additional improvements at the state level.

Political support is particularly important. The strategies described in Chapter V, without exception, require a commitment from elected representatives to allocate the needed financial or human resources or enact the required policy and regulatory changes. Communicating the extensive benefits listed in Chapter IV will help to convince politicians of the value of these initiatives.

### Broader City Infrastructure

Many of the cities cited in this report have explicitly recognized the importance of city infrastructure. A baseline level of transportation infrastructure, including public transit and parking near venues, is necessary to connect audiences with artists and venues, and thereby facilitate the growth of music scenes. Affordable housing is necessary to attract and retain artists, many of whom earn limited incomes.

### Music Education

Music education is present in successful Music Cities. Generally, it is understood to include formal music training in the education system, as well as specialized programs at colleges and universities. Not only do these programs help develop future musicians, but they develop appreciation for music

at a young age, seeding future audiences. The many other benefits of learning and playing music are well documented and wide-ranging. These include enhancing children's neural activity, language development, test scores, IQ and learning abilities.<sup>5</sup>

It is interesting to note that local music history and identity did not receive as high a ranking as might have been expected from the focus groups convened for this report. This is despite the fact that many Music Cities are steeped in music history. Liverpool, New Orleans, Memphis, Nashville and London spring to mind. For cities like this, music history is leveraged for economic and cultural gains. It is an asset that warrants protecting, celebrating and building upon. As Graham Henderson, President of Music Canada, notes, "A great Music City knows its music history – you need to know your own story."

# SECTION IV MUSIC CITIES: A HIT PARADE OF BENEFITS



thriving music scene generates a wide array of benefits for cities, from economic impacts to cultural development. Key benefits include:

- Economic impact;
- Music tourism;
- City brand building;
- Cultural development and artistic growth;
- Attracting and retaining talent and investment outside of the music industry;
- Strengthening the social fabric; and
- Validating music as a respected and legitimate industry.

These benefits are highlighted below.

### Economic Impact

Music can be a significant driver of economic activity, employment, exports and tax revenue. These impacts derive mainly from direct spending on the production of live music and ticket purchases by local residents and tourists, as well as music-related spending on such things as food, drink, accommodation and transport. Significant economic activity is also created in recorded music, publishing, music management and other related activities. Beyond these, music generates indirect economic benefits through spending in such areas as promotion and graphic arts.

A study by the music industry organization UK
Music measured the contribution of music to the
British economy at £3.8bn in 2013, with a full £2.2bn
attributed to music exports. The organization's
"Measuring Music" report pegs the number of
people working in the industry at 111,000, of which

almost 68,000 are musicians, composers, songwriters and lyricists.<sup>6</sup>

The impacts of Nashville's music cluster were thoroughly examined in the 2013 "Nashville Music Industry" report, which found that the music industry helps to create and sustain more than 56,000 jobs within the Nashville area, supports more than US\$3.2bn of annual labour income, and contributes US\$5.5bn to the local economy for a total output of US\$9.7bn.<sup>7</sup>

In Melbourne, Australia, a 2012 census found that live music alone generated more than A\$1bn in spending at small venues, concerts and festivals, supported 116,000 annual full-time equivalent jobs, and produced significant spin-off benefits to restaurants, hotels, transportation companies and other providers.<sup>8</sup> In 2009-2010, an estimated 5.4mn people attended live music performances in the city. This puts music in the top ranks of the city's economic drivers.

### Music Tourism

For cities looking to generate economic benefits from live music, tourist spending is a key part of the equation. Not only does tourist spending represent "new" money to a city, but it also generates additional spending beyond music. When tourists travel to experience live music, whether a concert, music festival or a favourite band in a basement venue, they will spend significantly more on hotels, restaurant meals, bars and other local attractions.

As Lutz Leichsenring of Clubcommission Berlin e.V. notes, "Tourists aren't coming (to Berlin) because there are hotels and hostels, but because there is content."

The economic impact of music tourism is well doc-

umented in Austin, Texas. Music tourism accounted for almost half of the US\$1.6bn of economic output and US\$38mn in tax revenue attributed to music there in 2010.9 SXSW, the city's iconic annual music festival, is a magnet for tourists and music industry professionals from all over the world. A study commissioned by the festival found that its economic impact in 2014 was an impressive US\$315mn.<sup>10</sup>

As reported by Texas Monthly, "To put it in perspective, SXSW Interactive director Hugh Forrest told the Austin Business Journal that the figure is roughly 65 per cent of the impact that a city like New Orleans sees from hosting the Super Bowl. It's nearly a third of the net impact that the 2012 Olympics had on London. And, as the report is keen to point out, those events are fleeting: the Super Bowl isn't in New Orleans every year, and the Olympics move on pretty quickly, too. SXSW happens in Austin every year, which means that both the economic impact and the cultural cachet that the festival brings to the city are permanent fixtures."11

Austin's music scene draws tourists in other ways as well. The city's successful drive to host Formula 1 racing, which



in itself attracts thousands of tourists, has been attributed directly to its strong music scene.

Music tourism is big business in the UK. According to the UK study "Wish You Were Here: Music Tourism's Contribution to the UK Economy," approximately £2.2bn in direct and indirect spending was generated by 6.5mn music tourists across the UK in 2012, generating the equivalent of 24,251 jobs. 12 The study found that 41 per cent of live music audiences are music tourists, and that overseas music tourists spent an average of £657 while visiting the UK. London, identified as the UK's music tourism capital, attracted one million music tourists during 2012. Manchester and Scotland were also popular with overseas fans: concerts and festivals in those places attracted 45,000 and 26,000 overseas visitors respectively. 13

Just about everyone knows that The Beatles hail from Liverpool. Unsurprisingly, the Fab Four are the city's number one tourist attraction, contributing more than £70mn to the local economy. Liverpool is the fifth most visited city in the UK. In 2013, tourists spent £3.64bn there, generating 49,000 jobs. Visitors cite The Beatles as one of the main reasons for visiting the city.<sup>14</sup>

Nashville, famous as "Music City", in 2014 welcomed approximately 13 million visitors who contributed over US\$5bn in revenue, creating 50,000 jobs. 15 While the contribution of music to that figure is not broken down, attractions like the Grand Ole Opry almost certainly make music the city's main tourist draw. Hundreds of thousands of people visit the iconic venue every year for live performances, backstage tours and as part of music tourism packages. 16 On top of this, over 900K people visited the Country Music Hall of Fame and many more attended other music attractions including the Musicians Hall of Fame and the Johnny Cash Museum.

In Music City, the Nashville Convention & Visitors
Corporation puts music at the core of its brand
promise (see case study in Tourism Strategy
section). According to Butch Spyridon, President
and CEO of the Nashville Convention and Visitors
Corporation, "Nashville is a city with great musical offerings, a plethora of talent where songs are
written and recorded, and an infrastructure of talent
liaising with businesses and creatives. Music IS the
brand; Music City is the brand name."

Also in Tennessee, Memphis draws more than 10mn visitors per year and tourism spending of US\$3.1bn annually. As the home of music heritage sites such as Beale Street and Graceland, Memphis's rich music history is its biggest tourism draw. Graceland attracts more than 500,000 visitors per year<sup>17</sup> and generates more than US\$32mn in annual revenues from visits, merchandise and branding. Sun Studio, famous as the recording studio of Elvis, Johnny Cash and other iconic artists, attracts 200,000 visitors annually.

Of the approximately 9mn tourists who visited Melbourne, Australia in 2013, nearly 2mn of them were international tourists. <sup>19</sup> International tourist spending was estimated at A\$4.5bn in a city where music is a top attraction.

Major music festivals draw large numbers of tourists to the cities that host them. The numbers are impressive:

- Rock al Parque (Bogotá) approximately 400,000 attendees in 2014; 87 bands performed.<sup>20</sup> "Rock al Parque" is one of the world's largest music festivals in South America, attracting more than 3.8mn attendees since its inauguration in 1995.
- Coachella Valley Music and Arts Festival (Coachella Valley, California) - US\$47mn in

- revenue (2012 and 2013); more than 158,000 attendees; US\$254mn estimated economic impact on the surrounding community.
- Lollapalooza (Chicago) US\$140mn estimated economic impact; approximately 220,000 attendees in 2014.<sup>21</sup>
- Reeperbahn Festival (Hamburg) 30,000
   attendees from approximately 40 countries, including more than 3,500 music and digital industry professionals and media representatives; 600 events, including about 400 concerts and 150 conference events.<sup>22</sup> Reeperbahn is Germany's largest club festival.

## City Brand Building

Music can play a powerful role in building a city's brand. For a select group of cities with the strongest music scenes or deep music heritage, music is a big part of who they are. Think "Liverpool," and most people think "The Beatles." Think "Memphis," and music icons like Elvis and Johnny Cash come to mind. Austin's familiar tagline is "Live Music Capital of the World." Nashville is, simply, "Music City." Other cities are well known as major music centres, though music may not be at the forefront of their brand identity. London, Melbourne, Montreal, New York, Berlin, Bogotá and Toronto are among these ranks.

Music branding not only helps to draw music tourists, but it adds a "cool" factor to a city that can accelerate other benefits such as attracting and retaining investment and talent. It also forms an important part of a Music City's self-identity. Clubcommission Berlin e.V.'s Lutz Leichsenring remarks, "What makes Berlin cool? Not the shopping malls that every city has. It's the artists."

Austin unveiled its "Live Music Capital of the World" tagline in 1991, and has reaped the benefits ever

since. From the moment one lands at the city's airport, the tagline is front and centre on promotional posters. The airport itself lives up to the brand promise by hosting 20-30 live music shows each week. The city interweaves music into its tourism outreach, and aggressively leverages the brand. Jennifer Houlihan, Executive Director, Austin Music People, remarks that for residents of the city, its music brand "is a big part of how people define Austin and how they define themselves." She adds, "People took it to heart as something they could count on in their community. People here have a personal pride in Austin's music positioning, even those not connected to the industry."

South Korea's upbeat style of pop music, "K-Pop" (known as "Hallyu" in Korean), has developed a global brand identity of its own. The international megahit "Gangnam Style" helped push K-Pop – and along with it, South Korea's brand – further to global prominence. This, in turn, has been credited for strong growth in tourism to South Korea<sup>23,24</sup> – up 13.4 percent in 2012 from the year before. In an interview with Mail Online Travel, Ramy Salameh, spokesperson for the Korean Tourism Organization in London, said that Gangnam Style and K-Pop had attracted a new audience to the country. "A 10.6 per cent increase in arrivals from the UK to Korea is a clear reflection on the growing popularity of the destination, helped in no small part by PSY's Gangnam Style," he remarked.

### Cultural Development and Artistic Growth

Beyond economic considerations, a successful Music City also creates the conditions to support artists in their career development. Access to the various supporting professionals, and the training to improve their craft and knowledge of the business enables more artist entrepreneurs to advance from hobby to career. In addition, more live performance



opportunities, in high quality venues of the appropriate size for the stage of their career, and in front of engaged audiences, help artists hone their skills.

David Melo, Marketing Manager of Invest Bogotá, attributes some of the city's growth in music creation to open-air festivals, which are part of Bogotá's Music City program. These events select artists through an open call for submissions, and pay them to perform. "This has provided performance opportunities and income for emerging artists in six genres, creating an incentive for bands and ensembles to develop."

Katja Lucker, CEO of the Musicboard Berlin GmbH, points out that Music Cities should aim to go beyond creating a receptive local audience. She feels that her organization will have achieved success when more local artists are recognized and appreciated not only at home, but abroad as well.

Global success can in turn benefit the city from which artists hail. But achieving those benefits is a challenge acknowledged in Austin by Music Program Manager Don Pitts. "The lack of market access in the US and abroad limits the international profile of Austin Music," he says. Export development in the music industry is supported by many national governments including in Canada, France, Germany, Australia and the UK. Where export support is absent, as Pitts can attest, both artists and the Music Cities where they are based, suffer. The Toronto-Austin Music City Alliance, a private-public partnership involving City Council, City staff and private industry leaders in both cities, is in large part a response to this challenge. Trade and export are primary motivators for the Alliance.

"There are artists that are currently rising up out of Australia – that's not a bad starting point for our music strategies," says lan James, Managing Director of Mushroom Music Publishing. "But the important thing is what they inspire in the next generation."

# Attracting and Retaining Talent and Investment Outside of the Music Industry

Music plays a role in attracting and retaining talent and investment in a city's broader economy. Damian Cunningham, Director of Audience and Sector Development in Australia's National Live Music Office, explains: "It is commonly understood that the life that the arts brings to a city causes people to move there and attracts industry. There is an enormous movement by local and state governments in Australia to enhance the vibrancy of their cities in order to hang onto youth, and attract entrepreneurs and businesses."

In Montreal, whose public policies support and which promotes itself as a cultural metropolis and city of festivals, Emmanuelle Hébert, an official with the city's Department of Culture, says investment attraction really boils down to brand perception. Of course, the basic economic factors must be met, but "What is going to make the difference between two cities? Quality of life for your employees. We believe that a thriving cultural scene, including music, is a key factor."

Richard Florida, author of "The Rise of the Creative Class" confirms that a thriving music scene attracts talented young people to cities. <sup>25</sup> This applies not only to work in music, but also to tech and many other fields as well. The world's top talent is highly mobile today. For many cities, putting their best foot forward to attract well-educated and talented young people is a major challenge in an environment of intense global competition. Music can be a big part of recruitment success.

This is not lost on the industrial companies based in Gothenburg, Sweden, according to Fredrik Sandsten, Event Manager Music at the public tourism agency. "We have a very industrial city with huge industrial companies," he says. "They want culture and music to flourish because they see the link to attracting young workers to their companies."

A study of Nashville's music cluster identified a cross-pollination with other parts of the economy, be it healthcare or media, that rely heavily on information technology workers. The study notes: "The attractiveness of Nashville as a city and region is predicated on its superior quality of life, affordability, and, very significantly, its truly unique culture and creativity that are known far and wide. Building the base of creative talent needed across industries becomes a much easier proposition where a leading business sector like Nashville's music industry is virtually synonymous with creativity." 26

A successful Music City can fuel other creative industries in other ways as well. For example, skills developed in many music industry roles, such as sound engineers, video producers and graphic designers, can be applied to other sectors.

Andrea Goetzke, a cultural producer based in Berlin, describes the intermingling of music and technology businesses in the city. "That really happened organically," Goetzke says, beginning when two large Berlin tech companies grew out of the music scene. In fact, their CEOs were part of the music scene before moving to tech. Many others have followed in their footsteps. Goetzke says it is estimated there are now more than 800 people working in music tech in Berlin.

# Strengthening the Social Fabric

Coincident with cultural benefits, vibrant music scenes offer social benefits. Music builds bridges

between cultures and languages, connecting people within a city, a region and across borders.

David Grice, Managing Director of South Australia's Musitec, an organization that works to foster the state's music industry, describes the cultural power of Music Cities: "Music is an industry like no other because of the way it touches human beings. It's an industry that engages people, that builds cultural expression and community, and adds so much energy to a city."

This can be especially impactful in places where the social fabric is frayed due to income disparity and other factors.

Andre Le Roux, Managing Director of the SAMRO Foundation in Johannesburg, South Africa, seeks to develop a stronger music scene there in large part to bring people together under a unified cultural banner: rich and poor, black and white, and across linguistic, regional and national divides. South Africa has one of the biggest income gaps in the world, with high levels of crime and unemployment – a situation exacerbated by the lingering effects of apartheid. Youth unemployment in South Africa was reported at over 50 per cent in 2013, according to the World Bank. "If you get more people performing music and playing instruments, you may get fewer

"Contemporary music is the way we express ourselves and who we are. It's where young people gather, share ideas, and spend time together."



people feeling angry, disillusioned and disenfranchised," Le Roux remarks.

This is a prime inspiration for Concerts SA, an initiative led by Le Roux's SAMRO Foundation in partnership with the Norwegian Ministry of Foreign Affairs.

In Venezuela, where more than 7 percent of the country's 30 million inhabitants live in extreme poverty, the El Sistema program teaches impoverished young people between ages three and 29 the principles of rhythm, singing, playing musical instruments and performing. The program is part of a United Nations Development Programme (UNDP)-backed project that has given poor children in Venezuela the opportunity to arm themselves with instruments rather than guns.<sup>27</sup> About 500,000 students participate in the program, which aims to double that number.<sup>28</sup>

In Bogotá, Colombia, one of the main social programs for children and youth is a music education program offered by the Fundación Nacional Batuta. The initiative uses symphonic orchestral practice to enhance both musical and social development.

Batuta's philosophy is based on the transformative power of music, its formative and socializing value, its contribution to welfare and to improving quality of life. In half of Batuta's 30 centres in Bogotá, 85 percent of the youth participants belong to the most vulnerable social class.<sup>29</sup>

The power of music to strengthen the social fabric is recognized in developed countries as well. Stuba Nikula, Director of the City of Helsinki Cultural Office, notes, "Arts and culture has been seen as a tool for tourism and city branding. But more and more it is seen as a tool to make a better society in general. A lot of art projects here focus on suburbs that aren't doing so well."

# Validating Music as a Respected and Legitimate Industry

A widespread challenge for the music industry is to convince policymakers, politicians and other industries of the wider economic benefits of music, limiting the industry's ability to gain a seat at the decision-making table, and to garner financial and policy support.

Occasionally, a single high profile music event can provide a convincing demonstration of music's benefits. Hamburg, Germany's Reeperbahn Festival draws thousands of music-loving tourists from all over Germany and abroad along with many international music business professionals, artists and creative industry professionals. Alexander Schulz, the festival's General Manager, remarks that this success has "dramatically" changed public and politicians' views on clubs, the music scene and the music industry. "That has helped a lot in generating support for funding, cultural promotion, marketing support, (more favourable) event regulations and more," he says.

More commonly, however, individual music businesses, which are typically small in size, lack the influence of companies employing thousands of people. Furthermore, any arts industry, especially one with a youth orientation, can be viewed in a different paradigm to those such as automobile manufacturing or real estate development. Yet in advanced Music Cities, estimated aggregate revenue and employment in the music industry can be significant.

Bobby Garza, General Manager of Austin's Transmission Events, describes the challenge as follows: "Our opportunity is to develop a sector of the economy that is more sustainable in economic downturns, that enriches the city's quality of life. The challenge is how to articulate that to civic leaders who are worried about picking up the trash."

When music stakeholders work together under a unified Music City umbrella, they gain greater legitimacy – and the ears of powerbrokers in business and all levels of government.

Austin, Melbourne, Nashville, South Australia, and more recently Toronto, are witnesses to this phenomenon. In all of those places, music stakeholders have gained a seat at government departments focused on industry or economic development, as well as cultural affairs. This gives music a bigger voice with an arm of government that has greater policymaking and funding clout.

# SECTION V EFFECTIVE MUSIC CITY STRATEGIES: STRIKING THE RIGHT CHORDS

ne has only to look at some of the most successful Music Cities in the world to realize that they have many approaches, action plans and strategies in common. Yet, it is normally impossi-

ble to simply transplant a comprehensive music strategy from one city to another. Strategies must take into account local circumstances including socio-economic indicators, political priorities, municipal structures and jurisdiction, and strengths and weaknesses of the local music community.

Some cities have seen relatively organic development of their music community, including the gathering of artists and the natural clustering of live music scenes. A few contributors to this report expressed fears that developing a strategy would harm the essence of their existing music scenes. However, if the music community is directly involved in the development of the strategy, evidence would overwhelmingly indicate that the scene will be nurtured and strengthened, not weakened or compromised.

Based on the findings of our focus groups, the following strategies were identified as the most effective ways to build a Music City:

- Developing a supportive policy framework;
- Establishing a city-run music office or hiring a music officer;
- Developing a Music Advisory Board;
- Engaging the broader music community;
- Ensuring access to spaces and places;
- Focusing on audience development; and
- Creating a Music tourism plan.

Research, such as the studies referenced throughout this report, informs Music City strategy development. It also helps tell compelling stories to governments and stakeholders inside and outside the music industry, to get their attention and compel them to action. In short, it is a key building block for successful Music Cities. Generally, Music City initiatives should undertake research in the following areas:

- · Economic impact studies;
- Music tourism impact studies;
- Business inventories;
- Needs assessments; and
- Resource guides.

# SECTION V.1 SUPPORTIVE POLICY FRAMEWORK: KEEPING CITIES ON PITCH



overnment policy has a direct impact on the prospects of any Music City. Whether at the municipal, state/provincial, or federal levels, policy influences all five of the essential Music City elements outlined in this report:

- Artists and musicians;
- A thriving music scene;
- Spaces and places for instruction, recording, rehearsal and performance;
- A receptive and engaged audience; and
- Record labels and other music-related businesses.

Governments can positively or negatively impact Music Cities, depending on the policies and how they are enacted. "Music-friendly" and "musician-friendly" policies encourage the growth of music creation, performance and recording, and attract and retain creative people. On the other hand, obstructive government policies make it difficult or impossible for music to be created, performed or celebrated, and can lead to an out-migration of artist entrepreneurs.

Berlin is widely known to be a great Music City. But according to Katja Lucker, CEO of the Musicboard Berlin GmbH, the city faces a major challenge. "How do we make sure that the creative people working here, and the creative companies that have located here, can still be here in a few years? How can we save the creative space for the creative people?"

# MUSIC-FRIENDLY POLICIES

Some simple questions can help us judge whether a municipality is music-friendly. Do music businesses

such as live music venues, record labels, recording studios and promoters receive the message that they are wanted in a city? Are musicians valued as entrepreneurs, and are they respected for both their cultural and economic roles? Is music valued as a creative pursuit? Is it an important cultural component?

There is a range of government policies that, together, can ensure that the answer to these questions is "yes." Many of them intermingle. They include:

- Liquor licensing and enforcement;
- Venue licensing;
- Parking and transportation bylaws;
- Noise bylaws (also called environmental laws in some jurisdictions);
- Land-use planning; and
- Tax treatment.

Often, a suite of policies – mostly municipal – affects the broader economy of which music is a part. For example, live music is a major part of a city's "night economy."

"Sometimes licensing is restrictive," says the SAM-RO's Foundation Andre Le Roux, in South Africa.
"Compliance should not be so much of a drain that it restricts a venue's ability to do business."

# Liquor and Business Licensing

The policy area most often under the jurisdiction of higher levels of government is liquor licensing, though enforcement of liquor laws is commonly overseen by municipal agencies. Liquor laws also often overlap with business licensing and licensing to host live music performances. While necessary for safety and other reasons, liquor laws and the conditions they contain can, if overly restrictive or confusing, threaten the viability of music venues.

In South Australia, the Liquor Licensing Act requires licensed venues wishing to host live music to obtain an "Entertainment Consent".30 This requirement specifies the type of entertainment that is permitted within the licence, in part to control noise issues.31 Citing one example – the Oostende Belgian Beer Café in Adelaide – David Grice of Musitec illustrates the constraints this imposes on venues. The Café's licence restricts it to hiring musicians who play didgeridoo, harp, harmonica, violin, flute, recorder or an acoustic guitar. Another venue is only permitted to have a 3-, 4- or 5-piece band. Solo artists and duos are barred from playing there. Navigating the narrow conditions of their licences has become a barrier to the flexibility needed to operate a successful music venue. The Music Industry Council of South Australia has prepared a submission recommending removal of the Entertainment Consent, as well as planning reforms, and Grice expects it to be tabled in Parliament. In any case, there are other ways Adelaide can address noise complaints: via other provisions within the Liquor Licensing Act and the Environment Protection (Noise) Policy 2007.32

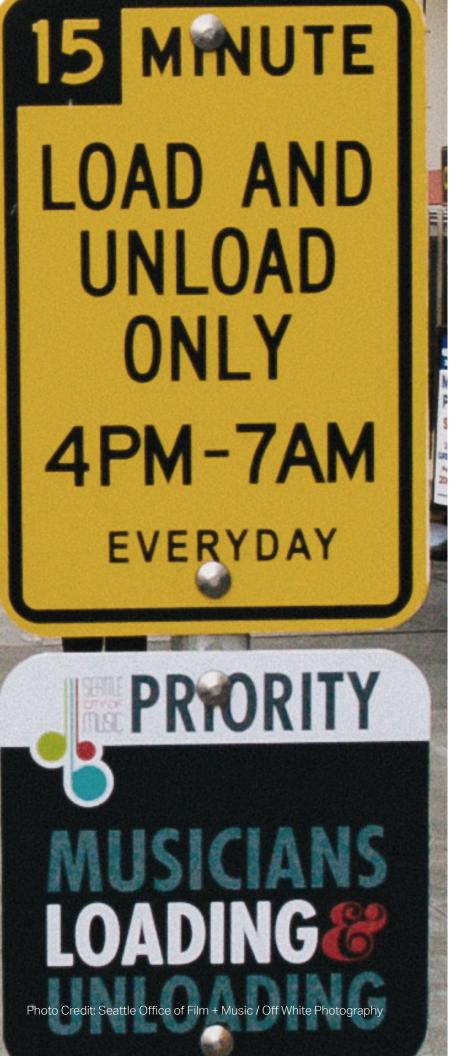
In New South Wales, similar licensing requirements were removed in 2009 when live entertainment became defined as "part of the normal activities of a restaurant [or] bar" such that today no additional licence is needed to play live music at a restaurant, bar, or club.<sup>33</sup>

On a national level in the UK, the Live Music Act, which came into effect in 2012, removed the requirement for small licensed venues to purchase an additional licence to host live music.<sup>34</sup>

In Toronto, provincially obtained liquor licences do not prescribe venue uses such as live music performance. Like other businesses, music venues are required to obtain a business licence from the city. The clarity ends there, however. There is frequent confusion as to whether or not live music venues belong in the tightly regulated "entertainment licence" category, which is intended primarily for nightclubs and restricts their locations to certain areas. Live music venues have been fined by city inspectors for failing to obtain an entertainment licence even though they are not explicitly required to do so in the bylaw.<sup>35</sup> While these fines have, in some cases, been thrown out in court, there remains an unacceptable level of uncertainty and potential legal costs for live music venues in the city.

In Australia's state of Victoria, new security requirements were applied to all entertainment venues as conditions of their liquor licences, in reaction to violence in nightclubs. For example, a restaurant with a live band was required to hire two security guards. This imposed unnecessarily high costs, effectively deterring live music in restaurants. Community activism in response to these restrictions culminated in a rally by about 20,000 people in 2010 called Save Live Australia's Music (SLAM), which is described in section V.4. Ultimately, a relaxation of the security requirements resolved the issue.

Live music venues are at the mercy of liquor licensing since revenues from alcohol sales are often essential to their profitability. The costs of operating a venue and producing live music cannot typically be recovered through ticket sales or door proceeds alone. Rules that impede liquor sales, therefore, can imperil venues. Cologne, Germany, for example, introduced a new law that banned smoking in clubs, similar to smoking restrictions in many other cities. The new law has had an unintended effect. Because Cologne permits alcohol sales by outdoor carts, patrons who go outside for a smoke will also often buy drinks. As a result, according to Till Kniola of the Cologne Culture Department, the clubs have lost liquor sales, threatening their viability.



Governments, the music community and other stakeholders should work collaboratively to avoid situations where regulations have unintended consequences or prevent reasonable commercial activity by assessing perceived problems and developing appropriate, well-crafted regulatory responses. Regulations should be carefully calibrated to respect community standards and the needs of residents and other businesses, but at the same time ensure a vibrant music scene.

# Parking and Transportation Bylaws

Parking and transportation bylaws can also directly impact music businesses. One of the most frequently cited challenges is loading and unloading of equipment. Cities such as Seattle, Melbourne and Austin have created loading and unloading zones near music venues, specifically for musicians. In Austin, 30-minute active loading and unloading zones have been established through a cooperative program between the ATX Music Office and Transportation Department. According to Music Program Manager Don Pitts, this "makes the task of handling musical gear both easier and safer for performers while also restoring mobility and freeing up parking for other downtown traffic." The same consideration could be given to recording studios and rehearsal spaces in high traffic areas.

### Land Use Planning

Perhaps the most complex municipal policy area affecting music is land use planning.

### CHALLENGE: GENTRIFICATION

Even the most successful Music Cities around the world struggle to address competing demands on land and spaces. Music landmarks all over the world, many steeped in history like London's 12 Bar, Nashville's RCA Studio A, The Silver Dollar Room in Toronto, Melbourne's Palace Theatre, and the childhood homes of John Lennon or Sir Paul McCartney in Liverpool, have been threatened by growth around them. Some have been saved while others have not. Each situation is different, but in many cases the pattern goes like this:

- 1. A low rent area, possibly a bit downtrodden, becomes attractive for music venues, recording studios or rehearsal spaces and artists in general because it is more affordable;
- 2. Artists and music businesses move in, and over time make it an attractive, cool area to visit;
- 3. Property values rise and more people and businesses want to move to the area;
- 4. Landowners see the opportunity to sell their properties to developers who build residential units or condominiums;
- 5. Rising costs (sometimes resulting from new requirements for noise reduction) and/or higher rents cannot be met by music venues, studios or artists, forcing them to go elsewhere.

Some say this is inevitable, but is it?<sup>36</sup>

Mark Davyd, CEO of Music Venue Trust in London, UK suggests that even though multi-use buildings can generate more profit than live music venues, we need to take a longer-term look at our cities. "The reason the people want to build in these spaces

is because they have a cultural history. (But) if by building there, they decimate the cultural activity, no one will want to live there."

According to UK Promoter Martin Elbourne, the key is that politicians and local councils understand the value of live music venues and the importance of protecting them. "Most cities don't need that many venues, he argues. But the loss of the one cool place to gather can mean young people aren't attracted to the city. In Adelaide it was the pending closure of The Jade Monkey (which has since reopened) that was the catalyst for my appointment as Thinker in Residence." At the end of his residency, Elbourne published the Reverb report, containing 46 recommendations. Twenty-three of those have been adopted in the Adelaide City Council Live Music Action Plan<sup>37</sup>.

In Brooklyn, the rezoning of the Williamsburg-Greenpoint waterfront to residential use about a decade ago was one of the primary inspirations behind a grassroots music movement called NY is Music, which launched in 2014. For NY is Music co-founder Bill Harvey, the initiative is a response to the loss of the multi-faceted, mixed use area that had become home to creators of all kinds. Despite a more recent effort to prioritize "creative economy districts"38 by New York City Council, Harvey remains skeptical of the music community's ability to halt progress. "We aren't going to stop the upward trend in urban real estate. It's too desirable. That's where the high value jobs are. And so the tactic is to build space for generative activity into the new city instead of implanting a suburban model into the city where people live here and go to work elsewhere." Harvey hopes that the movement to accommodate the growing numbers of people who want to live downtown will preserve adequate space for creative industries to thrive.

# CASE STUDY: NASHVILLE - MUSIC ROW

Nashville has become one of America's fastest growing cities. The region's population of 1.7 million is expected to reach 3 million by 2040. This growth threatens the continued existence of the cluster of streets known as Music Row, where music businesses have historically been concentrated. Several businesses have already given way to "progress" over the past few years. A notable exception – the famous RCA Studio B where Elvis Presley laid down more than 260 songs – was saved and leased to the Country Music Hall of Fame and Museum.

Emotions rose to a crescendo in 2014 when RCA Studio A, the lesser known of the RCA Studios which played host to Dolly Parton, Loretta Lynn, B.B. King, the Beach Boys and the Monkees, among many others, was slated to make way for condominiums. A group called the Music Industry Coalition was formed, and it managed to delay the sale until another purchaser could be found. A local preservationist stepped in to purchase the property for US\$5.6mn and the property has since been designated by the National Trust as a national treasure. The National Trust has committed to developing a strategic plan to ensure the studio's sustainability.

"I know progress is great," Pat Holt, a veteran producer and engineer who has worked with Johnny Cash and George Jones, told the New York Times. "This is my hometown, and I love to see it grow and expand. But I'd sure hate to see Music Row not be Music Row 20 years from now."<sup>39</sup>

A similar situation unfolded in Toronto when the El Mocambo, a 69 year old club that has played host to the Rolling Stones, Jimi Hendrix, Blondie and the Ramones, among others, faced the prospect of redevelopment under a new owner. Again, a well-heeled preservationist stepped in to purchase the building for CDN\$3.7mn and maintain it as a music venue.<sup>40</sup>

While it would be nice to think this could be replicated in other cities, in fact, it is very unlikely that there are enough wealthy music preservationists to save all of the world's threatened music landmarks. Therefore, a more policy-driven response is needed. Nashville is addressing the issue of gentrification head on. In February 2015, the Metro Planning Commission suspended any zoning changes for the purpose of redevelopment along Music Row for a minimum period of 16 months.<sup>41</sup> A study of the music cluster recommends the city seek a UNESCO

World Heritage Site designation for Music Row.<sup>42</sup> As Bart Herbison, Executive Director of the Nashville Songwriters Association International, explains, "Preserving heritage and cultural identity is important within a growing city. The path forward is a lot more productive if you know your history."

### Is Historical Designation an Answer?

Historical designation of music properties has been pursued in many jurisdictions. In Liverpool, the homes of John Lennon and Sir Paul McCartney have been purchased by the National Trust and are available for tours. Ringo Starr's childhood home was in danger of being leveled but will now be saved as part of a city redevelopment plan.<sup>43</sup>

In Toronto, The Silver Dollar Room, which was built in 1958 and has attracted such musicians as Levon Helm, Bob Dylan, The Barenaked Ladies and Blue



Rodeo, was recently spared when it received official heritage designation by Toronto City Council.<sup>44</sup>

But even the City of Toronto champion behind this move recognizes that heritage designation has its limits.

Heritage preservation, says Mary MacDonald of the City of Toronto's Heritage Preservation Services, is about protecting something of value. For centuries it was the tangible that drove preservation – the bricks and the mortar. But today there is an ongoing international conversation about the intangible. In Toronto, music landmarks have generated the greatest public response. "Memory preservation is most important - the places that tell the story of the city's evolution. Music landmarks connect very personally with people. We must understand them in the greater context of the part they played in the live performance circuit, who went there, who performed there, and how the audience reflected the growth or evolution of the city. Music tells an important social history," says MacDonald.

But while this intangible element of music landmarks may drive the bid for designation, the tangible ele-

ments – the building, interior and exterior architectural details – continue to be what is designated. With music venues, those tangible elements may not always be evident. "It's a lot easier to make a case for ornate places because they have stature, but heritage doesn't always have to be pretty," MacDonald says. "Sometimes the grotty needs to be protected. Some people think The Silver Dollar is a hole."

Still, the greatest challenge with heritage designation is that while you can designate a building, and perhaps interior elements, you cannot prescribe how the property is used. You can only encourage it. MacDonald points out that The Silver Dollar will only be saved as a music venue if the people who own it choose to do so.

In light of that, is heritage designation still worth pursuing? MacDonald believes the answer is yes. "We can't presume what will happen. Designation could encourage someone to continue to use it as a venue because it's a landmark and has more value. It can become a selling feature even for developers because an historic music venue has meaning for the community and in a culture."



## **Cultural District Designation**

Pre-existing clusters of music venues and businesses, such as Music Row in Nashville, can be candidates for designation either as entertainment or cultural districts.

Montreal's Quartier des Spectacles<sup>45</sup> is a designated cultural district that recognizes the historic development of a theatre, music and artistic section of downtown Montreal, enhances it through infrastructure and cultural programming investments, and promotes it. It has 30 venues in one square kilometre and hosts more than 40 festivals. According to Emmanuelle Hébert of the city's Department of Culture, the initiative was sparked by cultural leaders but gained support from governments at the provincial and federal levels under the city leadership. The city has invested CDN\$150mn in the project to establish the needed and adapted infrastructure for cultural outdoor events and has mandated a non-profit with the management and cultural programming of the area's public spaces, besides regular festival programming.

Austin Music People, a music lobby group, successfully led a campaign to have a four-block area of Austin that includes some of Austin's most famous music venues including the Mohawk, Stubb's and Elysium, recognized as a live music district. The Red River Cultural District, approved by Austin City Council in October 2013, gives live music venues more influence over development planning in the vicinity. The designation was leveraged to speed up approval of musician loading and unloading zones, and to create opportunities for cooperative marketing and promotion.<sup>46</sup>

Conversely, there are efforts in many cities to create new arts clusters where they did not previously exist. An industrial area of Marrickville, Australia, for example, has been identified as a strong candidate for a creative industries hub. The proposed Sydenham Station Traditional and Creative Industries Hub would permit uses considered complementary to continued industrial uses, while presenting an opportunity for revitalization. The hub was proposed following extensive community consultation, in response to a number of key policy recommendations including Sydney's Live Music and Performance Action Plan.<sup>47</sup>

CHALLENGE: THE PERCEPTION THAT MUSIC IS INCOMPATIBLE WITH OTHER LAND USES

Beyond the challenge of gentrification, which often drives up property values and rents to an unsustainable level for music businesses, the music businesses that initially made an area attractive are often perceived as unwanted neighbours.

A recent survey of more than 100 music venues in the UK has identified the problem as one of noise versus nuisance.48 Music Venue Trust's Mark Davyd, explains that in the UK, by consequence of law, "Music is identified as a noise, noise is identified as a nuisance, and nuisance is the responsibility of the person who created it." To compound the problem, the music community has not done a good job explaining the value of small clubs. As a result, many venues are challenged on issues of noise or planning and don't have the money to mount a proper defence or to upgrade their facilities in order to meet stricter requirements. This, in addition to the challenging economic environment for small clubs, has resulted in a significant decline in their numbers. In London in 2010 there were 400 small clubs: it is estimated that there are 100 fewer today.

London is not alone. Musicboard in Berlin seeks to find a middle ground between the competing interests of investors building new flats and the live clubs that preceded them in the neighbourhood. "A few years ago no one wanted to recognize that this is a problem but now everyone recognizes it," says Katja Lucker, CEO, Musicboard. "We need to be sensitive about this topic."

The same issues – noise complaints and perceived conflicting interests between new residential developments and music venues – are behind new legislation in San Francisco that would provide legal protection for existing venues. The legislation, introduced in late 2014 and now under consideration by city legislators, is designed "to help preserve San Francisco's live music venues during a time of rapid new residential construction," according to a news release announcing the initiative. 49 "The legislation requires developers to engage with existing venues from the outset, protects venues from unfair complaints, and ensures residents are informed about a nearby venue before they rent or buy."

The proposed law follows the closure of several storied San Francisco venues in the wake of accelerating residential development into traditionally industrial and commercial areas. Longstanding venues there have increasingly faced noise complaints from new residential neighbours.

Supervisor London Breed, the legislator behind the proposed law, remarks that, "San Francisco's night-clubs, bars, and theaters attract 16,000,000 customers each year and generate over \$800,000,000 in spending. But more than that, these venues are an integral part of our culture, of what makes us San Francisco. As we build more housing for everyone who wants to live here, we have to protect the reasons why they want to live here in the first place." 50

Specifically, the legislation would:

- Prevent venues that are operating within their permit from being deemed a legal "nuisance";
- Require better sound testing before developers can build near a venue;
- Oblige developers to work with nearby venues and the Entertainment Commission well before construction begins;
- Ensure that prospective residents of units near a venue are informed about the venue beforehand; and
- Improve communication among relevant City departments and empower the Entertainment Commission get involved early in the development process.<sup>51</sup>

# CASE STUDY: AGENT OF CHANGE PRINCIPLE, MELBOURNE

In August 2014, the Victoria State Government introduced a suite of reforms called the Live Music Action Plan in response to a 2012 Industry Position Paper by Music Victoria. Among them, was the Agent of Change Principle, which was adopted in land use planning and informs decisions by liquor licensing authorities. The Agent of Change Principle determines which party is required to adopt noise

mitigation measures in situations of mixed land use. If the "agent of change" is a new apartment building that is being built near a pre-existing music venue, the apartment building is responsible for sound attenuation. On the other hand, if the music venue is undergoing renovations and therefore is the "agent of change" in the neighbourhood, it is responsible for noise mitigation.

The Victoria Government also announced a half million dollar fund to assist heritage venues in addressing noise mitigation.

The Agent of Change Principle works well where there is a concentration of established music venues that are threatened by encroaching residentia developments. An effort is now underway to have this principle adopted in part of London. UK.

However, in areas where there is an effort to increase the number of music venues, the principle may not be the best policy choice. If the "agent of change" is the music venue itself, then the protec-

tions put in place by the Agent of Change principles may, in fact, deter or even prevent the establishment of the new venue

For that reason, it may be best to consider agent of change only in very specific districts of a city. Montreal's Emmanuelle Hébert says the principle was adopted in 2014 in Plateau Mont-Royal, a borough of the city that is described as moving "to its own funky beat." Plateau Mont-Royal is a mixed-use neighbourhood, home to many artists, students and young families, and brimming with nightlife including theatre and music venues. It has the highest concentration of artists and cultural workers in Canada.

# RECOMMENDATIONS

- 1. Government departments responsible for liquor licensing, business licensing and other public safety measures, should work with the music community to identify compliance issues that restrict business growth in an effort to identify mutually-beneficial solutions.
- 2. Transportation planning and parking zones should take into account the needs of existing and developing music business clusters for efficient access. This should include short-term, reserved parking spots for active loading and unloading.
- 3. Land use planning should take into account culturally significant sites and zones to protect their ongoing viability, recognizing that these are often the assets that make neighbourhoods attractive to additional investment. Developers should be required to take into account these existing sites as part of the planning process, coordinate their activities with all relevant city departments, and inform future purchasers about the presence of music venues and clusters.
- 4. Music communities should explore the viability of historical designation or cultural zone designation to bring awareness to the value of individual sites and zones.
- 5. The Agent of Change Principle should be explored in areas where there is already a significant number of live music venues.

# MUSICIAN-FRIENDLY POLICIES

A critical mass of artists was most commonly cited, during interviews for this report, as being essential for any Music City.

"It comes down to the quality of the music," says lan James, Managing Director of Mushroom Music Publishing, Australia's largest music publishing company. "In the end, the great thing is where geniuses live, where magnificent music is made. That's the enduring legacy."

Many interviewees describe an organic clustering of artists and musicians in their cities: that the musicians were there before the city government, associations or agencies became involved – even before music businesses. "Musicians tend to congregate around other musicians," says Austin's Bobby Garza of Transmission Events. "The city wouldn't have responded if musicians didn't flock here as they have over the past few decades. You need that organized level of involvement. You can't manufacture that."

Musicboard's Katja Lucker describes a similarly organic gathering of artists in Berlin: "Berlin is a really special city because of the wall and the times after the wall came down. It became a really wild place

where the city said you can do anything you want to build up a new scene, which created a unique culture of creativity in Berlin. That was the reason why I came to Berlin."

While it may be impossible to "manufacture" the secret something that causes artists and musicians to gather in a city in the first place, it is possible to create a more sustainable environment for musicians and artists with "musician-friendly" policies and programs, many of which are likely to be driven by the public and private sectors.

# KEY CHALLENGE: AFFORDABILITY

If the goal of musician-friendly policies is to create a more sustainable and fertile environment for artists so that they can have the freedom to create, then affordability must be considered. A low cost of living has been identified as one of the motivators for artists choosing certain cities or regions. Montreal continues to press this as an advantage, as does Berlin, though there are concerns that Berlin is not as affordable as it was 10 years ago; Tennessee has the second lowest cost of living of all U.S. states, the second lowest state and local tax burden and no personal income tax on wages.

"Musicians are constantly used as a draw to get potential clients into businesses. It would be good to make them feel valued. Small gestures of appreciation go a long way."



As the cost of living increases in many cities, musicians' incomes generally do not keep pace. Austin Music People has identified a critical gap in the rising cost of housing, for instance, and the stagnant incomes of musicians. <sup>52</sup> Numerous housing projects have been completed in Austin to provide musicians with affordable apartments and communal housing. "Without a doubt, affordable housing is an issue that impacts many citizens beyond Austin's musicians and other creatives, but the opportunity cost to the city if those who build our "brand" can no longer afford to live here is a significant one."<sup>53</sup>

Nashville has put a similar focus on affordable housing for musicians. In 2013, it completed Ryman Lofts, an affordable housing project with 60 apartments geared towards artists.

# Musician Business Training

Inextricably linked to the issue of affordability is a musician's income. If artists and musicians'

incomes were significantly higher, then affordability wouldn't be an issue.

However, earning a living as an artist has never been easy, and according to some, is even harder today. Robert Levine, past executive editor of Billboard, sums it up well: "It has never been easier to distribute a creative work. At the same time, it's never been harder to get paid for it." <sup>54</sup> Live performance income is increasingly important for artists, but touring costs are high. And while record companies have safeguarded investment in artists as a proportion of their income as much as possible, their revenues are roughly half of what they were before 1999, meaning there is less money to invest. <sup>55</sup> Moreover, notes Patrick Donovan, CEO of Music Victoria, "bands are charging the same for their shows at small venues as they did 25 years ago."

Asked how he would judge the success of Music City strategies, Musitec's David Grice responds, "Just to be able to provide a future that enables people to make a decent career out of music."

# "We have doctors and lawyers who make a lot of money and we have musicians who have more intellectual property than those guys, who struggle to make minimum wage."

David Grice, Musitec, Adelaide

The availability of professional development services for musicians is not only an aid to furthering their skills as small-business entrepreneurs, but also in making a municipality more musician-friendly.

The Bogotá Chamber of Commerce, which prioritized music and other cultural industries as a key economic sector, is developing 30 different services to support these industries. The services include professional development and training. According to Gareth Donal Gordon, the Chamber discovered that few artists and musicians know how to build their businesses and monetize their work. In Memphis, The Consortium MMT (Memphis Music Town) offers a national mentorship program with a six-week intensive process for young artists to enhance and further develop their creative brand. David Porter, Founder and CEO of The Consortium MMT, explains that the program, "champions the history of Soul music while providing young artists with backstage access to the music industry with mentorship support by superstar established artists. This unique concept helps to bring back the credibility of the music-making process, giving

artists the necessary tools to become the Soul music stars of tomorrow."

The future establishment of a new Talent
Development Center complex in downtown
Memphis, will be used to further the goals of artists
who will have gone through the program.

Chicago has adopted a comprehensive music strategy that focuses on leadership and government support, live music and education. Retention of the creative class is a key objective. In consultations and focus groups, creative industry employees between the ages of 18 and 25 were asked how the city could help them succeed in Chicago, as a way to dissuade them from moving to other cities such as Austin. Access to networks and mentors emerged as a primary need, and the Chicago Track program was created.

The program provides professional development and networking opportunities along with workshops that often lead to internships in the music industry as well. The program has a high level of retention.

# CASE STUDY: COALITION MUSIC, TORONTO

Coalition Music, which started as a music management company in 1991, now supports artists' development at all stages of their careers It is the home of Canada's Music Incubator (CMI), a not-for-profit corporation, and the high school-focused registered charity, TEMPO (Through Education Music Provides Opportunity).

Within the renovated walls of a former convent, entrepreneurs Eric Lawrence and Rob Lanni have built studios, rehearsal spaces, professional development and educational programs, and performance space, to provide artists with a place to create, learn and hone their skills. CMI provides professional development in two areas: Artist Entrepreneur and Tour & Tech. Separately, TEMPO offers "The Music Business", an accredited and free high school course as a complement to traditional in-school music teaching.

Outside of these programs, space is available for producers, labels, music publishers, marketing services companies and songwriters for short or long-term rental, thereby encouraging collaboration and cross-pollination of ideas. With state-of-the-art facilities, staff mentors and a vast network of music professionals, Coalition Music, CMI and TEMPO provide ongoing training and support for young people wishing to pursue almost any avenue within the music industry. Government funding and broadcaster support is also utilized in order to limit the cost of professional development for participants. In 2013, TEMPO also began taking its high school programs on the road to remote Aboriginal communities.



## The Support Team: Music Professionals

As noted in the Key Elements section, successful Music Cities offer an array of music businesses and music professionals who form larger teams supporting artist entrepreneurs. These include labels, managers, agents, lawyers and publicists. For high quality recording studios, experienced recording engineers and producers are also needed. Identifying any gaps in this larger group of professionals is a first step for Music Cities to develop ways to train and/or attract the talent they need.

Bobby Garza of Transmission Events in Austin believes that filling some of these gaps would help enable the expansion of his city's US\$2bn music industry to a US\$3 or \$4bn industry. He explains that artists in Austin face challenges monetizing their product. There is a particular need for more labels in Austin. Entertainment lawyers are also in short supply there, Garza adds. He believes that filling

these gaps should be a priority for music investment and business attraction in Austin.

Similarly, professional gaps have been identified in Adelaide. In his research for the Reverb report, Martin Elbourne discovered that the city had no artist managers. More recently, the city has identified a shortage of high level producers, according to David Grice. To fill the void, Musitec is examining options for training engineers – of whom there are plenty – as music producers.

Numerous government policies have a direct impact on the music economy's viability and success.

A city's level of "music-friendliness" and "musician-friendliness" is closely tied to those policies.

Working with the music community is the best way to maximize Music City benefits, resolve issues and avoid unintended consequences of regulation and enforcement. The chapters that follow provide some models for that engagement.

# RECOMMENDATIONS

- 1. Conduct a needs assessment of your community of musicians, singers, songwriters and producers in order to identify policies that can help them succeed along with key challenges and obstacles to pursuing music as a vocation.
- 2. Inventory the music professionals and businesses available to support artists in their careers including managers, agents and labels.
- 3. Based on these assessments, identify the priority needs and opportunities. These may require financial support, infrastructure spending, training or programs in other areas.
- 4. Identify key public and private sector players who can help deliver programs to meet the identified needs and priorities.

# SECTION V.2 CITY MUSIC OFFICE: LAYING DOWN THE TRACKS

usic offices or officers (though not necessarily by that name) are present in one form or another in many of the cities studied for this report. They include Seattle, Austin, Melbourne,

Chicago, Toronto, Hamburg, Berlin, Bogotá, Kitchener (Canada), Montreal and Cologne. The larger the office, the greater its scope. In cases where there is a single officer, the role tends to be more narrowly defined. Ideally, a well-established music office will carry out the key functions outlined below.

# KEY FUNCTIONS

### Navigating City Hall

One of the basic functions of a music office is to be the main point of contact at City Hall for music businesses, including live venues. As described in the previous chapter, many municipal government policies and regulations impact music, and hence many city departments have some level of authority over music businesses. In some of the most successful Music Cities, experience has shown that a single office or point of contact at City Hall is the best way to ensure clear communication and direction between the municipality and the music community.

Bill Harvey, co-founder of NY is Music, makes the comparison between New York's approach to film and television productions vs. live music: "If I'm a film company and I want to shut down Times Square during rush hour, I go to one person and I have a permit in three hours. If I'm a musician and I want to plug in an amplifier and play music in the park, I have to go to multiple departments to secure permits in the double digits."

Prior to the creation of the Music Sector Development Officer position in Toronto in 2014, music stakeholders found that, "the environment for getting business done with city government is not particularly easy for them to navigate." The city's new Music Officer, Mike Tanner, says he is "aiming toward one-stop shopping – as easy and decipherable as possible."

The Seattle Office of Film + Music, as the principal body responsible for advancing the goals of Seattle's City of Music program, is responsible for special events in the city, serving as a one-stop shop for promoters and producers of live events. The office facilitates meetings between city departments (fire police, licensing etc.) and promoters and event managers. "We literally put them in the same room," says Director Kate Becker.

## Liaison with Music Commission or Advisory Board

In cities with a volunteer music advisory board, committee or commission, the music officer typically acts as the primary city staff support or liaison. Seattle's Kate Becker, for example, facilitates the connection between the city's Music Commission and the Office of Film + Music as part of her role as Director. Her duties include staffing Commission meetings and developing meeting agendas. This role helps her support Seattle's three goals as a Music City: to be a city of live music, musicians and music business.<sup>57</sup> Similarly, in Melbourne, Toronto and Austin, the music officer leads this activity.

### Lead a City's Music Strategy

Many successful Music Cities have a music strategy that has been endorsed by City Council. These are multi-year, complex plans that benefit from a single staff or department lead.



Similar to Seattle, in Melbourne, Hannah Brooks' main job as Business Advisor is implementing the city's Music Strategy. In Bogotá, the City of Music plan, developed following a successful application for a UNESCO designation, falls within the Department of Culture, Recreation and Sport. 58 And in Chicago, Dylan Rice is the staff lead for music at the city's Department of Cultural Affairs and Special Events (DCASE).

In other cities, including Adelaide, Memphis and Nashville, where there are music strategies but no music office or officer, the volunteer advisory boards take more of a leadership role.

### Internal Advocacy/Education about Music

A music officer who understands the issues and challenges facing the music community can also serve as an advocate or educator within City Hall. Don Pitts, Music Program Manager for the City of Austin, explains that his department "serves as a resource on live music issues." Jennifer Houlihan of Austin Music People (AMP) agrees, explaining that the relationship between AMP, the Music Commission and the City Music Division "is powerful when they are working in lockstep on the same agenda items."

In Gothenburg, Sweden, this function is often performed by the public tourism agency where Fredrik Sandsten describes his role as, "a link between the music businesses and the politicians. It is very much our job to make things happen quickly if it is something we support and believe in."

## Mediation

City music officers or offices often serve as mediators between music stakeholders and other external groups. Berlin's Musicboard, a government-funded

agency that functions similarly to the Austin Music Division, helps to mediate issues that arise between clubs, residents and city officials. Toronto's Mike Tanner sees mediation becoming an important part of his role, using communication as a tool to prevent conflicts. "People don't like to be surprised," he says. "There is an opportunity to channel communication through Business Improvement Associations, Councillors' offices and community groups to help smooth the relationships between live music venues and their neighbours."

### Education/Networking Programs and Events

Music offices often host or support programs and events that focus on networking or education. For example, Austin's Music Division funds the Music Industry Collaborative (MIC), an applicant-based mentoring program delivered by the Austin Music Foundation. "MIC fast-tracks the resources that busy music entrepreneurs most urgently need," Pitts says. "(It provides) meaningful dialogue with real-life entrepreneur mentors in a structured small group setting that also encourages peer-to-peer assistance."

Chicago's DCASE organizes similar programs. After several successful education and networking initiatives, Dylan Rice says his department is developing the largest free convergence of professionals from music and other creative industries. The Lake FX Conference will connect artists with new media to help them achieve success.

Berlin's Musicboard provides funding to the Berlin Clubcommission, which in turn provides basic support for its member nightclubs to assist with legal, financial, security and health and safety issues. Clubcommission also recently adopted an educational role with the producers of open-air music parties. The initiative is a response to height-

ened community concern over the parties, which consume a significant amount of police resources. At an information session attended by 150 of these impromptu event planners, the Clubcommission offered to support them, if the organizers made efforts to address the concerns raised by the broader community. Organizers were asked to sign a 10-point agreement that includes a commitment to keep noise at a reasonable level, and leave the parks the way they found them before their events. Clubcommission created a starter kit for open air events that includes trash bags, ashtrays and the agreement, among other helpful items.

### Grant or Loan Programs

Municipal financial support for the music community, where it exists, can be funneled through music offices. However, this function is distinct from the direct funding provided by Arts Councils to artists in a wide range of creative sectors. Berlin's Music-board, which is funded by the City of Berlin, in turn distributes funding to Berlin-based music companies, organizations or artists. Musicians can apply for scholarships and for new projects in Berlin or abroad. Musicboard also provides financial support to the Berlin Music Commission, which organizes networking and conferences for the business side of the music community, in addition to the Berlin Clubcommission programs mentioned above.

The Music Venue Assistance Program in Austin provides low interest micro loans to qualifying establishments to enhance the sound quality of indoor and outdoor venues while reducing the sound impact on neighbouring uses, according to Don Pitts.

In Paris, the city government provides financial support and other assistance for the broader music community. This includes €8.2mn for facilities and venues dedicated to contemporary music, almost

€800,000 for music festivals and other funding for music work spaces, special projects and setting standards for disabled access at venues. <sup>59</sup> One of the key funding priorities is to support innovative and creative projects that help to create a stronger professional music scene in Paris while encouraging the emergence of new artists, and new forms of creation and music distribution, according to Marianne Revoy, Conseillère culture (Cultural advisor) in the office of Paris Mayor Anne Hidalgo.

The music branch of Hamburg, Germany's Department of Culture supports the city's music community through financial support for small labels, venues and other recipients, and by acting as a hub for other public and private sector organizations involved in music. These organizations include: "Hamburg Kreativ Gesellschaft" (municipal institution founded to promote Hamburg's creative industries); RockCity Hamburg e. V. (organization for Hamburg-based musicians); LiveKomm (federal German live music commission); IHM (Hamburg Music Business Association); Clubkombinat Hamburg e. V. (Hamburg music venue and club association); and VUT-Nord (indie label association). The Department of Culture's Johannes Rösing says the music branch "cannot plainly be called a one-stop-shop for the music community. To attain the best results from our support we work closely with various institutions and associations."

# ORGANIZATION AND REPORTING STRUC-TURE

The most all-encompassing music offices are stand-alone agencies or departments. Berlin's Musicboard has three full-time staff and two casual employees. Seattle's Office of Music + Film has five full-time staff plus a part-time staff person, but

is responsible for both film and music. The Austin Music Division has five full-time, music-focused employees and is a department within the Economic Growth and Redevelopment Services Department.

In other cases, cities have a primary music contact or a music officer who works within a larger department. Naturally, they cannot be responsible for as wide a scope of activities as an entire music office. However, often they are able to rely on the support of other colleagues within their department.

Examples where a single music officer is housed in a larger department include Montreal, Gothenburg, Toronto and Melbourne: Emmanuelle Hébert is part of a 200-person Cultural Department at the City of Montreal; Fredrik Sandsten works in a stateowned destination company in Gothenburg with 120 employees; Mike Tanner's music development role is the single music-focused position in a 30-35 member department that includes Tourism and Visitor Services, Film, Television and Digital Media and Event Support.

# Music Officer Background

In most cases, music officers have previous experience in the music industry or another creative industry.

In a media interview promoting one of his first major initiatives, Chicago's Dylan Rice draws the link between his current role and his past work as an artist: "I've lived and breathed [this industry]," he told Michigan Avenue magazine. "I've worn all the hats, I've made some mistakes, and I've learned the hard way. I empathize with a lot of artists who are trying to do it. So I'm hoping my experience as an artist is informing my experience in government." 60

Andrew Vincent, a musician based in Ottawa, Canada and author of Connecting Ottawa Music, notes, "Someone needs to be in the city who has a personal connection to music, who brings that perspective, who has travelled and seen what others have done in other cities."

### CHALLENGE: CHANGES IN POLITICAL LEADERSHIP

Political support is fundamental to maintaining government commitment to a music office, not to mention a larger music strategy. Chapter V.4 describes how consensus in the music community is the best way to develop political support. But political leadership is prone to change. This can spell uncertainty for music programs.

Mayors in Berlin, Chicago, Toronto, Seattle and Austin have been instrumental in securing budgets for music officers and their programs. Three of those five cities have recently undergone a change in leadership. Whether or not this will affect those cities' music programs remains to be seen. Strategies outlined in the next two sections are designed to overcome this potential hurdle: establishing a music advisory board, and most importantly, fostering an engaged and supportive music community.

# RECOMMENDATIONS

- 1. Establish a single point of contact whether an individual or team for the music industry within City Hall mandated to:
  - a. Help the music community navigate relevant city government departments and policies;
  - b. Lead the city's music strategy or lead the development of a strategy if one does not exist;
  - c. Liaise with the volunteer music advisory board or commission;
  - d. Help other city employees, agencies and elected officials understand the issues facing the music sector; and
  - e. Mediate between the music community and other community groups in order to resolve conflicts.
- 2. Music should be recognized as a commercial industry, and therefore the officer should be housed in a department focused on economic development.
- 3. Ensure the person hired as a music officer has direct experience in a creative industry, preferably music.
- 4. Engage the broader music community as well as political decision-makers to continuously promote the importance of the music officer/office to ensure sustainability and continued funding.

# SECTION V.3 MUSIC ADVISORY BOARDS: MAKING A POMERFUL ENSEMBLE

usic Advisory Boards or Commissions provide an effective link between a city's music community and local or provincial governments as well as other city stakeholders. They are

a forum to generate dialogue within the music community and open lines of communication to others in the private and public sectors. In keeping with their names, they are generally advisory in nature, rather than decision-making bodies. Some boards participate more heavily in the delivery of programs. For instance, the Memphis Music Commission, supported by an Executive Director, provides a legal clinic, pre-paid health care plans for musicians, workshops, seminars and other services.

The overarching purpose of Music Advisory Boards is to enhance the environment in which music operates within a city. In some cities, this is defined in very broad terms. The Conseil Parisien de la Musique (Paris Music Council), created last year under the administration of Mayor Anne Hidalgo, while still in its early stages, seeks to find ways that the public and private sectors can together support emerging artists, enhance venues, improve contemporary music education, boost marketing efforts, and ensure that Paris's music scene offers rich and diverse musical offerings at prices that are accessible to all. In announcing the Council's creation last year, Paris Deputy Mayor Bruno Julliard said the initiative will bear fruit only if all the players - both private and public sector - agree to share the costs of the proposals it advances.<sup>61</sup>

Depending on the level of government with which they interact, resolutions passed by a music advisory board will either proceed to a city music office, committee of city council, full city council, mayor's office or premier's/governor's office.

Research for this report identified music advisory boards or committes in the following jurisdictions:
Austin, Nashville, Memphis, Seattle, Bogotá, Paris,
Berlin, Melbourne, Toronto, Wollongong and South
Australia. Some other cities have advisory boards with a broader cultural mandate, of which music is a part.

# CORE FUNCTIONS

Music advisory boards typically fulfill the following functions:

# Create consensus within the music community

Music advisory boards most often include music industry leaders representing all segments of the music industry. The boards create a forum for discussion of issues affecting the music community and a means by which to develop consensus and present a unified voice to government.

# Provide advice on the regulatory and legislative environment

Music advisory boards act in an advisory capacity to government on legislation, regulations and programs. This often means that boards have the ability to draft resolutions for a committee of council, full city council, or for the Mayor or Premier, depending on the level of government with which they interact.

# Provide opportunities for the music community to liaise with key city stakeholders

Music advisory boards create opportunities for information exchange and advice between the music community and other key stakeholders such as chambers of commerce, tourism and convention agencies, neighbourhood associations and government departments involved in economic development or arts and culture.

# STRUCTURE

There is no "one size fits all" model when it comes to music advisory boards. Depending on the city, there are variances in size, structure, members, member selection, and the level of government with which they interact.

## Size

Berlin's Music Advisory Board (which advises Musicboard, the city's de facto music office), has only 11 members, whereas Toronto's Music Industry Advisory Council has 35. Nashville's Music City Music Council started with 40 members, but through restructuring the number has been reduced by half.

### Membership

Most music advisory boards are composed primarily of leaders from the music industry, with key elected representatives and government staff from relevant departments or agencies. Music industry representatives at the municipal level tend to be appointed by the mayor, city council or a combination of the two, but in some cases are appointed by the city music office or an equivalent body.

Some boards contain a broader membership that incorporates community leaders whose roles have a connection to music – for instance, tourism agencies, hotel associations, Chambers of Commerce and music commissions or officials serving a higher level of government. The recently established Conseil Parisien de la Musique, for example, brings together officials from three levels of government – municipal, regional and national – to work with music stakeholders on policy issues. Those stakeholders include major and independent music labels, venues, music publishers, record shops, artists'

unions, music associations, trade unions and music academies.<sup>62</sup>

Membership composition is critical as has been discovered in Bogotá, where music is the focus of one of six councils for the arts. Juan Luis Restrepo of the City's Department of Culture, Recreation and Sport, stops short of calling it a formal music advisory board, but many of its functions are similar: it is supposed to "approve, discuss, debate and agree on general public investments in music in the city and assess the City of Music program in its strategic decisions and long term policies." However, Restrepo notes that the efficacy of the council is hampered by the lack of participation of "really strong actors in the music scene."

### Jurisdiction

Some music advisory boards have been established at the provincial or state level, rather than the municipal level. These focus on the overarching needs of a state/provincial music community and the impacts of the legislation, regulations and programs overseen at the provincial/state level.

# Committee Structure

Several of the larger music advisory boards have a committee structure that enables more detailed analysis of specific issues, and task-oriented work. Seattle's 21-member Music Commission, for example, has subcommittees pertaining to policy, youth and community, executive operations and social justice.

In South Australia, the 12-member music industry council relies on as many as 40 additional music community members who participate on issue-specific subcommittees.<sup>63</sup>

The new Conseil Parisien de la Musique directs working groups to focus on different policy areas. The entire council, which has neither a budget nor a president, will meet as seldom as twice a year in a plenary session.

### OPPORTUNITIES

Music advisory boards present an effective means to avoid potentially negative impacts of government legislation on the music community. Don Pitts, Austin's Music Program Manager, explains that the Austin Music Commission is expected to "study the development of the music industry, assist in the implementation of programs to meet the needs created by the development of the industry, and review matters that may affect the music industry."

Austin Music People's Jennifer Houlihan describes the process: "We do as much work as possible with stakeholders before it gets to the Music Commission, so by the time they get it, they are only passing things to City Council that are as bullet proof as possible. It gives council cover, so that they don't get a surprise backlash."

Music advisory boards also lead studies on the music industry. The Live Music Taskforce established

in Wollongong, Australia began its work with a live music survey that identified the active venues and level of music activity, as well as a tour of licensed premises for relevant city staff. Advisory boards in Austin and Nashville have commissioned economic impact studies.

In Nashville, the report's findings were used to drive economic development initiatives, thereby supporting one of the Music City Music Council's primary goals: to attract and recruit entertainment companies to the city. As Hank Locklin, the Senior Advisor of the Music and Entertainment Industry for the State of Tennessee, explains, this helps to cement Nashville's image as a "vibrant Music Business City" through its consistent high ranking of music related output and workforce when compared to the rest of the U.S.

The Council is also involved in partnerships with the Entrepreneurial Center in projects such as the Musicpreneur program, which enlists local music industry leaders to engage with young entrepreneurs about their involvement in the future of the music industry.<sup>64</sup> In addition, it is involved with an Entrepreneur Center initiative called Project Music, a 14-week music tech accelerator program launching in 2015.<sup>65</sup>

### RECOMMENDATIONS

- 1. Develop a music advisory board representing a cross-section of the music community and key decision makers in agencies that have an impact on music (e.g. tourism agencies).
- 2. Enlist the involvement of music industry representatives with larger networks to facilitate two-way communication with government.
- 3. Governments should utilize the music advisory board as a sounding board for legislation, policies and programs, providing members with ample opportunity to study the issues and engage their networks to provide feedback and ideas.

# SECTION V.4 ENGAGING THE BROADER COMMUNITY: PUTTING THE BAND TOGETHER

usic City development
will, without question, only
be successful with the
engagement of the people
impacted most – the music
community. Whether it
is the private or public

sector that initiates this engagement appears to be immaterial. In some cases, the music community has been the initiator, often in response to acute challenges to their livelihood. In other cases, a government body has set out to engage the music community in order to grow the sector. Whichever side gets the ball rolling, the key is that all relevant players are involved.

### DEFINING THE BROADER MUSIC COMMUNITY

Many of the strategies addressed in this report deal most directly with live music. This should not be surprising, since live performance is more significantly impacted by the municipal policies cited in section V.1. However, all aspects of the music ecosystem are inextricably linked and therefore stand to gain from effective Music City strategies. For that reason, this discussion of music community engagement includes stakeholders at every step in the music value chain:

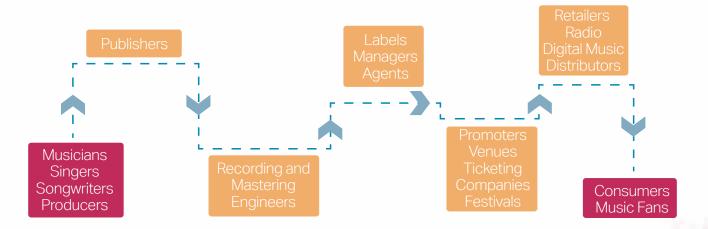
### BARRIERS TO COLLABORATION

"There's a crab in a bucket infighting mentality within the music industry that comes from scarcity."

Jennifer Houlihan, Austin Music People, Austin

A variety of barriers to engagement of the broader music community were identified by music industry experts interviewed for this report:

- The informal, almost cloistered, do-it-yourself nature of most music creation and distribution today;
- The involvement in music of many part-time workers and hobbyists;
- The reality that many small and medium-sized businesses and artist entrepreneurs are, by necessity, focused exclusively on making ends meet;



- The lack of sufficient professional advisors (managers, lawyers, agents, etc);
- Competitive issues among key stakeholders;
- The absence of an advocacy organization representing the commercial music sector.

Overcoming a tendency among music community members to view others as competitors, rather than collaborators, has been a key priority in Toronto.

"The local music community supports itself in ways in 2015 that were unheard of in 2011," says Mike Tanner, Music Sector Development Officer at the City of Toronto. "Music Canada helped bring together a lot of disparate voices under one tent, looking for areas of commonality where they could all benefit and engage different levels of government to get support. Most of the good operators have put most of the squabbling on the back burner. There's a lot of willingness to collaborate now."

### Conflict Serves as a Catalyst for Engagement

When the music community overcomes these barriers by pulling together, it is often in response to conflict or crisis.

In Paris, conflict between residents and operators of bars, nightclubs and other night-time activities inspired a petition entitled "Paris: When the night dies in silence," as well as collaboration by affected stakeholders and, ultimately, to a response by the city government. 66 This culminated in the creation by Paris Mayor Anne Hidalgo of the Conseil parisien de la nuit (Paris council of the night), in late 2014. The council brings together elected officials from every city district, institutions, associations and others to find sustainable solutions and to help pacify relations between residents and night-time

revellers. It works in collaboration with the newly formed music council to develop solutions and enhance night-time music activity, says Marianne Revoy of the Paris Mayor's Office.

There are many other examples: the threat to historic venues and recording studios in Nashville spawned the creation of the Music Industry Coalition; a loss of venues in London led to the establishment of the Music Venues Trust; and, burdensome regulatory changes to live music in Australia inspired Save Live Australia's Music (SLAM), the organization behind the largest cultural protest in the country's history.

Rallying support in times of crisis is always easier than in times of peace.

### CASE STUDY: SLAM RALLY, MELBOURNE

Save Live Australia's Music (SLAM), a national activist group based in Melbourne, Australia, was created in 2010 in response to new liquor licensing laws that threatened the viability of live music in the State of Victoria. The restrictive laws were passed in reaction to incidents of violence at some nightclubs

SLAM, a volunteer-run group, organized what became the largest cultural protest in Australia's history, on February 23, 2010. Musicians and music lovers were encouraged to march on Parliament House to protest the "draconian regulations" that "threaten to pull the plug on live music".67

The protest organizers predicted that more than 10,000 would join the march. In fact, 20,000 people took to the streets.

The huge turnout got the attention of politicians. Ultimately, the restrictive laws were eased and the live music industry and the State Government of Victoria ratified The Live Music Accord 2010. The SLAM Rally also helped expedite government funding for Music Victoria, an umbrella organization for all music groups in the state, which had been launched before the rally, in January 2010.

"There's a great sense of community in Melbourne between the various elements of the music industry that has evolved quite naturally," says lan James, Managing Director, Mushroom Music Publishing. He considers this essential for any successful Music City. "It can be encouraged over time, but people have to have the will to do it. However, once you've got it, it is a very rare and precious commodity."



### Opportunity as a Catalyst for Engagement

In the absence of a catalytic event, it is still possible to get the broader music community engaged in a Music City initiative. This can be led by an organization within the music community like Austin Music People, Music Victoria, UK Music or Music Canada, for example. In other cases, governments lead this effort as they realize the value of consensus and are driven by goals to increase the economic, societal and/or cultural benefits of an industry.

In cities including Adelaide, Chicago, Bogotá and Kitchener, Canada, initiatives to bring the community together in order to identify common challenges and opportunities have been led by city officials and elected officeholders.

When the Premier of South Australia identified music as one of the state's key economic drivers, he directed government departments to look at music as an industry for the first time. It was under Premier Jay Weatherill's direction that UK Promoter Martin Elbourne was engaged to study the industry and that Musitec was created to build collaboration in the music community in order to increase jobs and new economic opportunities. "The problem with South Australian music is that we've never really worked together," says David Grice, Managing Director of Musitec. "So we're running workshops and events to build a sense of community around the musicians because we can't develop a spirit of collaboration if people don't know each other."

In Chicago, one of the key responsibilities of the city's Department of Cultural Affairs and Special Events (DCASE) is to "convene the industry" and "create forums for industry experts to interact and address shared goals." Dylan Rice, Chicago's Director of Creative Industries – Music, says that the

"city is working to break down barriers between the different components of the industry (recording, live performance etc.), and genres of the industry, with the rationale that a more unified music community will strengthen the city's efforts to attract business development and tourism." Rice's department does this by hosting events and conferences including Lake FX Summit & Expo, Chicago Music Summit, Creative Industries Spotlight, and ChicagoMade at SXSW.

In Bogotá, music was identified as a key asset for marketing the city to Latin America and beyond, as a destination for tourism, immigration and investment. Bogotá is brimming with music and culture, however the music community itself is very fragmented. According to Juan Luis Restrepo in the city's Department of Culture, Recreation and Sport, when the city applied for UNESCO City of Music designation, it was expected "to get the music sector to work together and to develop a greter appreciation for city projects." Many private sector organizations are involved as well in trying to create greater connections in the music community. The Bogotá Chamber of Commerce, for example, organizes Bogotá Music Market (BoMM), an annual conference and showcase event.

In Canada, the City of Kitchener organized a grass-roots facilitation to strengthen the city's music scene. This involved 130 community members, including general audience members, musicians and those directly involved in the business of making music, and venue owners. Together, they focused on three general outcomes: expanding the audience; growing the music business; and enabling live commercial music venues to thrive.<sup>69</sup> The resulting strategy, Music Works, continues to drive the city's music program today.

"We can't expect government to understand our unique issues... the sector must present a coherent position and message that government can understand."

- Focus group participant

### EFFECTIVE COLLABORATION DELIVERS RESULTS

Building consensus and broad support in the music community can lead to impressive results.
"Stuff doesn't just happen," says Austin's Bobby Garza of Transmission Events. "It happens when there's a groundswell of support,"

The results achieved by SLAM in Melbourne, and by the Music Industry Coalition in Nashville demonstrate the power of broad-based support and collaboration (see Chapter V.1).

Garza cites music community organization as the catalyst for the creation of Austin's Music Division, while Austin Music People's Jennifer Houlihan credits music community engagement in part for the decision to allow Uber to operate its mobile app-driven ride sharing service in Austin in order to provide patrons with another safe way home.

In Toronto, notes Music Canada President Graham Henderson, music community collaboration led



to the creation of the Toronto Music Advisory
Council and the creation of the city's Music Sector
Development officer position, as well as a provincial
Live Music Strategy and an unprecedented
CDN\$45mn grant program for the music industry
called the Ontario Music Fund.

In cities where there is resistance to change, political champions – mayors, councillors or leaders of higher levels of government – have often been instrumental in creating the impetus for positive improvement.

Political champions can come from any part of the political spectrum. In South Australia, for example, the first effort to increase the long stagnant support

for the music industry came from a member of the Green Party. But it was Premier Jay Wilson of the Labor Party who influenced the more recent changes.

Cultivating positive relationships with elected officials is essential if success is to be achieved.

On the flip side, if there is no consensus and collaboration in the music community, it is inevitably harder for governments to understand the unique challenges faced by the sector, and governments will be far less motivated to make positive changes. A divided community discourages political action because policy decisions are unlikely to receive clear and broad support from the people affected.

### RECOMMENDATIONS

- 1. Create opportunities for networking, mentoring and education in order to build relationships and trust within the music community.
- 2. Seek consensus on common issues that will deliver broad benefits across the sector.
- 3. Address issues of conflict and competition behind closed doors in order to present a united front.
- 4. When crisis occurs, use the situation to build support for sustainable music advocacy organizations and sustained engagement.
- 5. Develop strong relationships with elected officials at all levels of government, and of all political stripes to help overcome bureaucratic inertia.

## SECTION V.5 SPACES AND PLACES: WHERE THE MUSIC HAPPENS

usic needs a home. Or in the context of a Music City, it needs many homes: rehearsal spaces, recording studios, music education institutions and live performance venues.

The latter must span a broad range of types: indoor and outdoor, small, medium and large; formal and informal. Shabby basements where budding artists get a start. Massive concerts halls filled to capacity by international superstars. Parks used to host music festivals. These and other places are where artists connect with music fans. They are the places where musical talent is developed and music is created, perfected and recorded.

Quantity and variety of spaces are important, but so too is quality. The great live music that draws audiences requires great sound. This is not to say that a venue needs to be an aesthetic showpiece. As Music Canada's Graham Henderson notes, "For the live artist starting out, you need a place to play – grungy, basement places, and places of ascending size, creating what I like to call a stairway to heaven." But whatever the appearance of a venue, it should have good sound.

In the most advanced Music Cities, such spaces and places form a large and complex music ecosystem where music can flourish and artists can grow. Often, there is an "organic" aspect to the development of a rich ecosystem. Music venues and their patrons tend to cluster on certain streets and in specific districts. The infrastructure, expertise and artists that nurture one recording studio can spawn others. More importantly, however, are the policies and programs initiated by both the public and private sectors. These policies and programs are important or even essential to protect existing music spaces and create new ones.

Municipal government policy steers property development, land use and bylaws affecting a building's use. It is also the means used in most cities to make affordable housing available, which can benefit artist entrepreneurs. As such, some of the key, policy-related issues identified in this section are explored in further detail in section V. 1 of this report.

### TAKING STOCK

When considering strategies to enhance and expand a Music City's spaces and places, a logical first step is to take inventory. How many rehearsal spaces are available? Are there enough recording studios at different price points? Are there record labels, management companies, agencies and other music businesses that are critical parts of the music economy? How many live venues are there? How many are mainly music-focused, and how many treat music as a secondary concern? Are the venues high quality? Do they span a full range of sizes and genres? The need to get answers to these questions - to take inventory - was recognized by the City of Melbourne, Australia in its 2014 Melbourne Music Strategy. The report recommends that the city "Conduct an audit that identifies existing and new spaces that support music performance, collaboration and rehearsal."

### **Beyond Buildings**

The Melbourne Music Strategy recognizes that spaces and places need not be made of bricks and mortar, music is also performed in the streets and parks as a "part of everyday life." [Melbourne Music Strategy] The report elaborates:

Music will be a centrepiece of life in Melbourne. Musicians of all cultural backgrounds and genres will be a common sight in the streets and at outdoor/indoor venues, and people will know where to go to hear live music during the day and at night. Having ready access to live music will increase community pride and wellbeing, and make Melbourne a more welcoming, vibrant 24 hour city for residents and visitors.

In Toronto, the head of the city's Downtown Yonge BIA (Business Improvement Area) in Toronto also views the street as a place for music. The BIA plans to revitalize the role music plays in this section of the city through music programming, guided walking tours about music history, and infrastructure and space development. According to a Nov. 28, 2014 story in Toronto's Globe and Mail, BIA Executive Director Mark Garner sees Yonge Street – a roadway in the heart of the city – as "about both fancy restaurants and buskers, and populated by social agencies as well as students."

### The Venue Ladder

To support a thriving music community in which artists can get a start, develop their talent and

"The places are critical. Artists and their fans need easy access to an eclectic range of sites and venues, from intimate to world class."

Graham Henderson, Music Canada, Toronto

then shoot for the stars requires a full range of live venues, from tiny clubs to large stadiums, and everything in-between. This continuum of venues, where artists have a place to play at every stage of their careers, has been called the "venue ladder." Ideally, a Music City will have one or more venues for every step up the ladder.

Andrew Vincent, a singer-songwriter in Canada's capital city, Ottawa, describes the benefits of having a range of venues: "It brings a range of artists to the city. There are a lot of touring artists that can fill a 500-person general admission room but can't do a 1000. By having that range, it brings bands at certain levels where they are big enough to have generated an audience, but are still at the development stage, which can be really inspiring for local musicians. It also strengthens connections between the local scene and national booking agents." Noting that some music fans might not go to smaller clubs, Vincent also sees the venue ladder as a way for artists to reach a broader audience.

A major challenge for Ottawa's music community is gaps in its own venue ladder. Vincent remarks, "Ottawa seems like a great place to get started in music. There are lots of places with open mic nights, small venues where you can get gigs, there are studios where you can record that are affordable, you can get spots opening at some festivals. But where the city is lacking is in the development potential between the smaller scale and the larger scale. We don't have the medium sized venues."

Gaps like this are not uncommon, even in larger Music Cities. Toronto, for example, lacks a 5,000 seat arena – an important stepping stone for artists eyeing the biggest stages. Helsinki is missing a 3,000 seat facility although there are plans for one as part of a proposed new home for the live music association, according to Cultural Director Stuba

Nikula. Other communities invest heavily in large, premium venues that host leading international acts, but budding local artists have few or no options where they can cut their teeth.

Filling these gaps doesn't always require completely new builds. Some communities have found innovative ways to renovate shuttered movie theatres, churches and other buildings that are no longer active in their original form.

### Downtown Clusters and Suburban Hubs

There is wide agreement that, when it comes to music, there is strength in numbers.

Neighbourhoods with a variety of labels, management companies and the like, develop a creative synergy. Clusters of venues along streets or in districts attract larger audiences. Among other music industry professionals, UK music promoter Martin Elbourne asserts that venues and audiences should be clustered first and foremost in the downtown core. "If you're trying to create a vibrant city, keep your musicians and your audience in the city," Elbourne says. "Everyone talks about clusters because they work."

Elbourne, author of the Reverb Report, which provided a roadmap for the South Australian Government to better support music development, advocates making the centre strong first, and only then looking at opportunities to establish music venues in the suburbs.

Toronto is fortunate to have strong music clusters in its downtown core. As a next step, Mike Tanner, the City of Toronto's Music Sector Development Officer, eyes the development of suburban music hubs so that audiences no longer have to travel across the city to enjoy live music.

Emmanuelle Hébert, an official with the City of Montreal's Department of Culture, says venues are beginning to pop up in suburban areas of her city. She notes that it is getting harder to bring people back downtown in the evening to enjoy live music. As newer venues in the boroughs are often programming similar shows, this new dynamic creates new challenges for city-based venues.

Development outside of the central core has been identified in Paris, France as an opportunity to revive a once-vibrant nightlife and music scene that has suffered under the weight of restrictive rules. An article in France 24 listed the reasons for this: "laws restricting opening hours, a lack of reliable transportation for night-time revellers and, especially, authorities forcing punitive temporary closures of venues following complaints by neighbours."

Some Parisians, the article says, believe that part of the solution lies in drawing more nightlife to the suburbs. Indeed, spreading music activity throughout Paris is a stated priority of the city government's music policies. Publicist Eric Labbé told France 24, "We can no longer conceive of Paris nightlife as exclusively within the city, which is the size of a postage stamp. In order to compete with cities like London or Berlin, we need to be the same size – which means Paris plus its surrounding areas." However, improvements to public transport – a function of government policy – are needed to make this achievable.

### CHALLENGE: IS THE ECONOMIC MODEL OF SMALL VENUES BROKEN?

The precipitous decline in the number of small music venues in London, UK has raised alarm bells among the city's music community. As noted in



the section V. 1 above, the number of small clubs in London has dropped by one-quarter in just five years, from about 400 in 2010 to 340 today. In response, live music venues have banded together to form the Music Venues Alliance, a new trade body aimed at protecting live music venues in the UK.

In a February 2, 2015 announcement, the Music Venues Trust called the Music Venues Alliance "the first significant response to the recent ICMP (Institute of Contemporary Music Performance) summary report 'Understanding Small Venues', which painted a picture of a UK live music venue circuit that is in a perilous and precarious state, facing an uncertain future at real risk despite the passion of the people involved in it."<sup>72</sup>

Slumping venue profit is the major reason for the decline, says Music Venue Trust CEO Mark Davyd.

Squeezed disposable incomes, expensive noise abatement requirements, rising rents and other factors are behind this. "It's not likely that we can run a small music venue as profitably as a pizza venue,"

Davyd says.

Despite this daunting challenge, there is a sense of mission behind the Alliance's work. In a Jan. 21, 2015 Music Week article on the Alliance, Davyd remarked, "It is important to emphasize the role that these small venues play in the ecosystem of British music, providing the first performance platform for writers and musicians. This is the grassroots and bedrock of the UK music industry which creates thousands of jobs and is one of our biggest export earners. These venues are the research and development department of that success."<sup>73</sup>

The City of London, along with music associations representing live and recorded music, have all voiced support for the Alliance. In March 2015, the Mayor of London's Music Venues Taskforce was formed, with Mark Davyd as Chair.

### MUSIC HUBS AND ACCELERATORS

While music spaces are struggling in some cities, in other cities the public and private sectors are working both separately and together to build new opportunities for artists and music businesses. The offices of major labels in Toronto, for instance, provide space for some of the independent labels with which they have distribution and marketing deals, providing an ideal way to share know-how and "apprentice" indie label company executives. Music hubs and accelerators are emerging in a number of forms in cities around the world.

### Nashville's Project Music

Project Music is a new music tech accelerator created in partnership with the Nashville Entrepreneur Center and the Country Music Association, in association with members of the Music City Music Council. The program began in January 2015 with eight start-up companies receiving US\$30,000 in seed money in exchange for 10 percent equity in the company. Google, Digital Entertainment Ventures and other high profile music and entertainment companies are sponsoring the program.<sup>74</sup>

### Adelaide's St Paul's Creative Centre

St Paul's is a creative industries hub in the heart of Adelaide's Central Business District. St Paul's is a 150 year old church which was also a former night club and function centre. This centre is now home to more than 15 music companies, including a registered training institute, South Australia's leading music industry body, Music SA, the state government's Music Development Office, and Musitec, which coordinates the centre. Musitec encourages emerging businesses to locate in St Paul's, occupy "hot desks", and book shared meeting spaces and function rooms.

### Chicago's Fort Knox Studios

Fort Knox is a Chicago recording studio offering shared rehearsal space and 92 recording suites in a more than 130,000 square foot facility. The privately owned and operated facility, which first opened in 2009, attracts as many as 200 musicians per day. Fort Knox is all about collaboration, connecting music industry professionals – sound and lighting crews, website developers, photographers and others – with talent. Just as importantly, it offers relatively low costs, made possible by sharing space.

### The City of Chicago's Live Music Strategy: Creating Music Hubs

The City of Chicago has developed a live music strategy that focuses on cultivating music hubs and districts in different neighbourhoods. The approach identifies specific "scenes" or key venues in target neighbourhoods, and uses them as catalysts to create a music hub in the area, according to Dylan Rice, Director of Creative Industries – Music, in Chicago's Department of Cultural Affairs and Special Events.

Each music hub comprises a destination – venues, music school, etc. – efficient transportation links and features such as restaurants and bars. The destination is mapped out, and tools and resources are provided to entrepreneurs to show them where the opportunities are, and how to make use of them. For instance, Rice recently drafted the city's first Venue Licensing Toolkit as a centralized roadmap to help start-ups navigate the licence application process and ultimately streamline it.

The approach is based on successful existing hubs, among them the Old Town School of Folk Music in Chicago's Lincoln Square area, which the city seeks to replicate elsewhere.

### CASE STUDY: MEMPHIS MUSIC MAGNET

Memphis Music Magnet is an innovative, arts-based neighbourhood revitalization project designed "to make Soulsville USA a community of choice for musicians and other creatives," according to Tsedey Betru, Vice President, Community LIFT. As it develops, it aims to provide:

- Targeted homeownership incentives and housing programs;
- Place-based neighborhood amenities achieved through the restoration and reuse of empty, but historically significant, buildings; and
- Programmatic community enhancements to attract activity to the neighborhood.

In 2012, Memphis Music Magnet acquired the birth home of the late, great blues pianist Memphis Slim. The property has been developed into the

Photo Credit: Community LIFT

Memphis Slim Collaboratory (commonly referred to as "Slim House") with high-quality rehearsal spaces and recording facilities. It is a membership-based facility designed to incent emerging artists from the region to take up residency in the neighbourhood. For just US\$75/year, members are entitled to eight mours of studio time each month with a professional sound engineer. The initiative includes plans to create artist residency opportunities at Slim House as well. The goal is to secure 50 members by the end of this year and 100 by the end of 2016.

'Having strong partnerships with city leaders and other organizations making investments in the neighborhood is a necessary pre-condition to successful redevelopment," says Betru, adding that once one cultural project is underway, she is confident it will stimulate many others.



### MUSIC EDUCATION INSTITUTIONS AND PROGRAMMING

Music education is an important component of Music Cities, as noted in the Key Elements section. Whether at the primary, secondary or post-secondary levels, music education provides a wide range of benefits. For this reason, music education spaces are another significant part of a Music City's infrastructure.

Some countries and cities, recognizing the benefits, place considerable emphasis on music education. Sweden's commitment in this area is often held up as a model for other countries. The city provides music programs to school children of all ages, according to Michael Blair of Stockholm's The House of Songs and Scorpio Music Production.

Municipalities and states in Finland also have a strong tradition of funding music education for

children and young people. Helsinki's Cultural Director, Stuba Nikula, explains that it is "in their DNA" to enrol Finnish children in music training, mostly in the classical tradition. This musical foundation helps raise the quality of the pop and rock scene as well, Nikula says. "The punk bands here don't sound like shit, because they know how to tune their instruments!" he remarks.

Music education has received renewed focus under the current political leadership in Bogotá. Juan Luis Restrepo explains that 20 years ago, arts education ceased to be a compulsory area in individual schools' curriculum, resulting in the loss of a large number of music and art teachers in public schools. Mayor Gustavo Francisco Petro Urrego made it a priority to put music and arts back into public education. Thanks to this policy, today 100,000 students in public schools study music. Post-secondary music education has also blossomed in the past few decades, from two programs in the 1980s to 11 today.

### RECOMMENDATIONS

- 1. Conduct an inventory of existing rehearsal spaces, recording studios and live music venues, noting their capacity, primary uses, licensing conditions, cost to access, quality of sound and lighting, and accessibility to transportation and parking.
- 2. Based on the inventory, identify gaps in the venue ladder and other spaces and identify potential public and private partners, as well as underutilized buildings that may be repurposed to fill the gaps identified.
- 3. Clusters, hubs and accelerators in their many forms can make efficient use of resources and expertise, while establishing an environment where artists are nurtured and respected. Investigate the opportunity for projects in your community.

# SECTION V.6 AUDIENCE DEVELOPMENT: BUILDING THE FAN BASE



receptive and engaged audience is essential to a Music City's success. The audience is inextricably linked to the diversity and depth of the music being created and the quality of the places where it is performed.

Don Pitts, Austin's Music Program Manager, gives the audience equal billing with government and industry for his city's music success: "Austin's renown as a Music City can be attributed to the efforts of a diligent music industry, a responsive local government and a supportive community of music patrons. All parts have contributed."

A variety of factors affect the development of a receptive and engaged audience. Section V. 1 addresses some of these factors including government policies around hours of operation, venue licensing, liquor licensing and land use planning such as, designated cultural zones. Other key factors are outlined below.

### **Engaging Youth**

Cities such as Toronto, Adelaide, Austin and Berlin point to their large student populations as helpful factors in generating engaged audiences. A recently released strategy for music in Alberta, Canada cited the "young, affluent audience" and the "highest per capita cultural spending" in Canada, as a key advantage. 76

Audience development must begin long before young people reach university age. Tomorrow's music fans are developing their entertainment tastes today. Stuba Nikula, Helsinki's Cultural Director, remarks on the consequences of the failure of his country's music industry to keep up with young people's changing entertainment preferences: "The biggest challenge in Helsinki is the lack of teenagers who are interested in live music. Kids are using their time and money somewhere else." In Helsinki's case, Nikula suggests that the scarcity of all-ages events is a contributing factor.

Martin Elbourne confronted this issue in the Reverb Report with a recommendation for the subsidization of under-age events. He explains that under-age shows are often not profitable for promoters and venues because they don't generate alcohol sales. Therefore, there is less incentive to produce shows for a younger audience.

The payoff from exposing young people to music cannot be underestimated, Elbourne says. "Seeing great bands ... in a great venue helps get youth excited about live music and makes it more likely

"Austin is a university town, making the average age in Austin (relatively) low. Those people are more likely to go out and enjoy music."

Jennifer Houlihan, Austin Music People, Austin



that they will have a lifetime of engagement with music and potentially the broader industry."<sup>777</sup>

In response to Elbourne's report, Adelaide's 2014-16 Live Music Action Plan contains several recommendations aimed at supporting audience development. The recommendations largely focus on featuring South Australian artists at city events and festivals. Although it stops short of advocating the subsidization of all-ages events, the Action Plan recommends tying the Live Music Strategy into funding from sponsorship, grants and community development programs.<sup>78</sup>

Music education programs also help to create a lifelong relationship with music, as described in the previous chapter.

### ACCESS

Audiences need easy access to live music events. Beyond the availability of a range of events, which has been addressed previously in this report, music fans must also have access to information on the events taking place, and convenient ways to get to and from them.

### Promotion

Andrew Vincent, a musician in Ottawa and author of Connecting Ottawa Music, points to the absence of a weekly local publication listing music events as a major challenge for his city's music community.

Bogotá faces a similar problem, according to Juan Luis Restrepo of the City's Department of Culture, Recreation and Sports. "With music, you never know what is happening," Restrepo says. "You have to swim underwater a little to find information from social networks." To address this problem, Bogotá's Arts Institute has developed a website to coordinate online promotion of live music.

Music Cities are increasingly utilizing social media and mobile apps to connect fans with local music. Cities such as Nashville, Austin and Melbourne provide free mobile apps for accessing live music-related information including concert calendars, venue locations and in some cases, music-friendly accommodations. In Canada, the province of Ontario, as part of a Live Music Strategy, has funded the creation of a live music portal<sup>79</sup> and app for all live music events of every genre. These apps are also promoted by tourism agencies so that music tourists can plan their visit before leaving home.

Attracting the attention of the world's press is often identified as key to audience development. In Gothenburg, Sweden, journalists from around the world are invited to attend – and report on – larger events and festivals. Stockholm has leveraged the Polar Music Prize to gain worldwide media attention as a leading Music City, according to House of Songs/Scorpio Music Production's Michael Blair. "The Polar Music Prize ... has grown to become the most prestigious music award in the world. In addition to the main ceremony in Stockholm in June, there will be an event soon in New York discussing the role of Sweden with international music successes. These events have attracted media around the world and focus on Stockholm's position as a major music city."

### **Transportation**

The ease of getting to and from venues is also critical to audience development. This relates directly to the larger infrastructure and transportation issues discussed earlier in this report. In places such as Birmingham, according to Tom Kiehl of UK Music, it is difficult for the city's large student population to attend music events. Getting to the gig at 7 p.m. is easy. However, buses don't run late enough for concert-goers to return home when the event wraps up.

The benefits of expanding the availability of convenient, accessible transportation alternatives is why Austin Music People lobbied the city in support of Uber, the fast-growing mobile app-based ride sharing service, as well as other transportation networking companies. Knowing that Uber has come into conflict with traditional taxi services and existing taxi regulations in many cities, Austin Music People spoke up to help it gain City Hall's approval. Live Nation, the world's largest promoter, has a strategic partnership with Uber to provide fast and efficient transportation for concert patrons. As reported in Digital Trends, Uber pick-up and drop-off zones will be available at participating Live Nation venues.<sup>80</sup>

In Australia, Music Victoria includes safe transportation in its Best Practice Live Music Guidelines. The guidelines provide venue owners and promoters with information about public transit and taxis, and underlines their responsibility for their patrons' safety.<sup>81</sup>

On a larger scale, easy access by air travel is important to establishing a Music City as a destination for touring artists as well as music tourists. London's Heathrow Airport recently identified the volume of travel by artists, who transport 90% of their equipment on regularly scheduled commercial flights, as an argument for airport expansion.<sup>82</sup>

The airports in Austin, Melbourne and Seattle are not only transportation hubs, but are also literally music hubs. In each of these airports, local musicians perform in front of audiences of national and international travellers as they pass through. In Seattle alone, the trial program generated US\$259,000 for the artists from wages, tips and merchandise. The program's success guaranteed its continuation for another three years.

Seattle's airport even permitted the opening of an independent label-run record store.<sup>83</sup>

### Proximity to Other Markets

Silvia Di Donato, Kitchener's Manager of Arts and Culture, acknowledges that Kitchener's close proximity to Toronto, which offers entertainment options on an international scale, poses a challenge for her audience development in her city. For local audiences, those options are easily accessed. The flip side is that a medium-sized city like Kitchener offers affordability and a high quality of life to artists who are starting and expanding their careers, says Di Donato. The city is taking action to drive its live music sector and support local audience development through its "Music Works" strategy, which supports large scale music festivals and emerging artist events.

Proximity to other Music Cities can also be helpful, as it creates the opportunity for a touring circuit. Helsinki's Nikula Stuba points out that Helsinki is a three-day detour for touring artists unless bands stop in Finland on the way to or from Russia. However, he expects that current geopolitical events undermining Russia's attractiveness as a touring destination are likely to have a negative impact on his city.

CHALLENGE: DEVELOPING AUDIENCE
APPRECIATION FOR LOCAL PERFORMERS

Cities as far afield as Stockholm, Kuala Lumpur,
Adelaide and Johannesburg cite challenges gaining

audience support for local artists. It can be hard for lesser-known, homegrown talent to get attention in an interconnected, media-saturated world where global superstars dominate the airwaves. Stockholm's Michael Blair explains that local consumers there are "super mega-trend conscious and show a lack of enthusiasm for unknown acts and artists."

South Africa faces a similar problem, according to Andre Le Roux, Managing Director of SAMRO Foundation. "The stadiums are for international artists, and people will pay big money. But for small venues with South African artists, it's hard to get people to pay. We need to start building a local music culture."

In response to these challenges, SAMRO
Foundation has launched Concerts SA in
partnership with the Norwegian Ministry of Foreign
Affairs. Concerts SA is an innovative initiative that
brings music showcases and workshops to schools
and venues in rural areas, creating opportunities
for artists and building long-term audience
development by focusing on youth. Students in rural
South Africa have typically never even seen music
instruments before, says Le Roux.

Concerts SA also subsidizes 23 venues in three large cities and smaller centres as part of the program to develop sustainable performance spaces, thereby fuelling both audience and artist development.





### CASE STUDY: MALAYSIA

While Kuala Lumpur has a strong small club music scene featuring local artists, most of the music they play is cover tunes of foreign superstars. This reflects the reality that local audiences want to hear the familiar songs played on radio and the Internet; that means top global hits from the U.S., Europe and other, mainly Western, nations.

"For foreign artists, audiences here will pay \$300, but for local artists they have a problem paying \$30," says Norman Abdul Halim, Executive President, KRU Studios, Cyberjaya, Malaysia. Moreover, many Malaysian artists today produce a limited number of singles, and therefore don't have enough repertoire to put on a show with their own music only – further limiting audience development for local music.

Inevitably, artists fall into line with audience demand for the hits

Compounding this challenge is religious conservatism, especially in rural areas, that results in the barring of a few foreign artists from performing in Malaysia. This channels even more audience attention to shows by the big-name foreign artists who are permitted to play.

"We have a very open policy on the Internet and people here are exposed to foreign movies, TV and music," Halim says. "The challenge is to get public acceptance for what goes on stage especially in the East Coast of Malaysia."

AIM21, Malaysia, Performers: Haiza, Ramlah Ram, Sheeda, Photo Credit; Recording Industry Association of Malaysia



### RECOMMENDATIONS

- 1. Live music strategies should include specific goals to expand access to all ages events and facilities.
- 2. Joint marketing of live music events should be coordinated by music associations, cities or tourism agencies, to ensure information on the full breadth of available options is available to music fans.
- 3. Transportation planning must take into account the "night economy" in order to facilitate access both to and from live music events. The importance of international travel should also be considered when planning for airports and routes.
- 4. Artist mobility should be enhanced in order to expose remote or segregated communities to a variety of music for its social and cultural benefits.



## SECTION V.7 MUSIC TOURISM: CREATES BONUS TRACKS

he worldwide growth in tourism has spawned intensified competition for tourist dollars. More and more cities are leveraging their music scene to draw visitors and the economic benefits they bring.

The benefits of music tourism are outlined in section IV of this report. In summary, the main benefits are:

- Revenue from concert and festival tickets, merchandise, hotels, restaurants, and other spinoffs;
- Job creation hotels, restaurants, venues and other places where tourists spend money need staff to meet the demand; and
- Building a city's brand by leveraging its musical heritage or music scene.

### INVENTORY OF A CITY'S MUSIC TOURISM ASSETS

The first step in developing a music tourism strategy is to identify a city's unique music assets. These may include music heritage, a live music scene and/or festivals:

Music heritage sites such as Memphis's Graceland and The Beatles' homes in Liverpool can be major tourist draws;

 Live music venues can attract large numbers of visitors throughout the year. Cities with the most vibrant music scenes, from small local clubs to huge concerts, get on the radar of music fans. Helsinki, Finland, for example, offers about 10 different live music events on

- any given day, says the city's Cultural Director, Stuba Nikula. Melbourne, with 370 hotels, bars, nightclubs and restaurants featuring live music, is a magnet for music fans;<sup>84</sup>
- Music festivals such as Bogotá, Colombia's
   "Rock al Parque," Austin, Texas's SXSW, Indio,
   California's Coachella, Barcelona's Sonar and
   Budapest's Sziget are go-to events for many
   thousands of visitors, many from distant
   countries.

### CHALLENGES TO DEVELOPING MUSIC TOURISM

### Measurement

More needs to be done to carve out the impact of commercial music within tourism data. Commercial music statistics are typically not distinguished from the general arts, culture and leisure sectors, making it difficult to make the case for music tourism promotion and to develop well-targeted strategies. Yet, cultural tourists have been found to stay longer and spend more than other tourists, making them a lucrative target group.85 In recent years, the UK has been at the forefront of reporting the impact of music tourism on its economy. With this data, the UK has been able to identify gaps and create opportunities to encourage further tourism-related economic development. In the UK Music report, "Imagine", it was estimated that music heritage alone could be worth more than £4bn if more cities matched Liverpool's performance.86 Both Melbourne and Austin have also measured the tourism impact of commercial music on their communities and have used this information to successfully advocate for favourable policy reforms for live music venues.

### Authenticity

One of the key challenges with music tourism is ensuring that commercial promotion of a city's musical assets does not devalue those assets by making them appear contrived or inauthentic. Music scenes are rooted in artists, and much of their attraction stems from that. Inappropriate use of music as a promotional tool can erode that perception. Conversely, successful tourism strategies build on an authentic product, whether music or otherwise. Lutz Leichsenring of Berlin's Clubcommission notes that music is one of the most important industries in Berlin, in part because it drives tourism. Yet, until recently there was very little engagement of the music industry by tourism agencies. "Tourism marketing people were selling the music scene without talking to the people within it," Leichsenring says. Recently, however, representatives from the music industry were invited to help influence the direction of a film screening about Berlin's club scene in São Paulo, Brazil. This resulted in a more authentic product, according to Leichsenring.

### Gentrification

Gentrification is one of the biggest threats to music tourism. A growing urban population puts pressure on land use planning, as has been described in other chapters. In many areas, redevelopment has led to the closure of iconic venues – even some world famous ones – that draw tourists. This has a two-fold negative impact. First, it threatens to eliminate key differentiators that help a city stand out. Second, it reduces the spaces available for performance, impacting the overall level of live music activity.

### MUSIC TOURISM OPPORTUNITIES

### Multi-City Alliances

Some cities have joined together in strategic partnerships to create opportunities to promote music tourism. Cologne and Istanbul have had a longstanding alliance that recently added music to its mandate. In 2014, the two cities held electronic music festivals that featured musicians from both places. A pair of cities steeped in musical heritage, Memphis and Liverpool, became sister cities in 2004. Since then the cities have mounted cocurated exhibitions featuring their music icons. For example, "Elvis and Us" chronicled the impact of Elvis and The Beatles on contemporary music, as well as the day the artists met in 1965. The exhibition ran for three years, until August 2014, and attracted well over 150,000 visitors.

### **Branding Initiatives**

One of the key opportunities for music tourism is the development of an authentic music brand that helps put a city on the tourist map. In Bogotá, the City of Music began as a branding exercise, notes Juan Luis Restrepo of the city's Department of Culture, Recreation and Sport. This came about when the marketing company charged with identifying Bogotá's story pointed out that Bogotá is a city of music and culture.

A handful of cities specifically express their music story through a brand. Memphis's tourism website proclaims the city as "The Home of Rock n' Roll/ Birthplace of the Blues"; the city is also known as "Soulsville USA," based on legendary soul music studio, Stax Records. Music leaders have initiated branding in Melbourne<sup>87</sup> and Toronto<sup>88</sup> with Melbourne Music City and 4479 Toronto respectively.

Few cities have leveraged their music branding to draw tourists as effectively as Austin, the self-proclaimed "Live Music Capital of the World." The Austin Convention and Visitor's Bureau (ACVB) has consistently marketed the city's unique cultural brand for over 20 years, using innovative programs. As an example, the ACVB Music & Film office actively markets Austin as a convention destination based on its live music scene, taking musicians on the road to land new convention business,

producing compilations, and programming music for conventions. The Bureau produces in-depth information on the city's music scene with branded radio stations, TV and social media highlighting local musicians. The city is also well-known among music fans worldwide for producing some of the world's largest and best-known music festivals and offers year-round shows in its 270 live music venues.

Melbourne and Seattle, like Austin, have launched music branding strategies in their airports where local musicians perform in front of national and international visitors. From virtually the moment visitors step off their plane, music is placed front and centre before them.



### CASE STUDY: NASHVILLE

In 2014, Nashville – "Music City" – welcomed more than 13mn visitors who contributed over US\$5bn in revenue and supported 50,000 jobs. <sup>89</sup> The name "music city" was coined in the 1800s by the Queen of England and today is reinforced by the city's Brand Promise: "The Promise of Nashville, where the music is inspired, created, recorded and performed, is to provide the ultimate musical entertainment experience, celebrated throughout our diverse cultural and entertainment offerings, and presented in an authentic, unique, friendly and unpretentious atmosphere"

The campaign has been strongly supported by the Convention and Visitors Corporation, which uses the city's music note logo on buildings such as the visitor centre and convention center, souvenir items and promotional materials. <sup>90</sup> In addition, coloured guitar pick signs, which have been featured on national television programs such as The Voice and American Idol, indicate different genres of music venues within the city. The city's tourism website,

visitmusiccity.com, features a radio station with local artists and a wayfinding app for tourists connecting them to the live music scene. The Music City brand has also been featured overseas in a campaign that wrapped London taxis with the Music City logo.<sup>91</sup>

The Music City brand was further enhanced by the Tennessee Department of Tourist Development, which used it in a 2014 campaign to become a "Top 10 market among state destinations". The campaign, called "Made in Tennessee", featured TV commercials, online and prints ads, social media and a branded website extolling the "rich musical heritage, history and present day offerings." The campaign was also linked to the TV show "Nashville," which highlights local music and venues The show's popularity has garnered international interest in the city, with music at the forefront. The Made in Tennessee website leans heavily on music, featuring not only Nashville but also the Bonnaroo music festival and sites made famous by the Blues Trail outside of Memphis.<sup>92</sup>



### RECOMMENDATIONS

- 1. Together, the music community, city and tourism officials should identify the available music tourism assets including music heritage sites, live venues and festivals, and initiate policies and programs that support their continued operation and growth.
- 2. A Music City brand should be developed with the involvement of tourism experts in conjunction with the local music community, in order to ensure its authenticity.
- 3. Music tourism should be defined as a distinct category in tourism impact studies, in order to better identify music-specific opportunities and challenges.

### SUMMARY OF RECOMMENDATIONS:

### Government Policy: Music-Friendly Policies

- 1. Government departments responsible for liquor licensing, business licensing and other public safety measures, should work with the music community to identify compliance issues that restrict business growth in an effort to identify mutually-beneficial solutions.
- 2. Transportation planning and parking zones should take into account the needs of existing and developing music business clusters for efficient access. This should include short-term, reserved parking spots for active loading and unloading.
- 3. Land use planning should take into account culturally significant sites and zones to protect their ongoing viability, recognizing that these are often the assets that make neighbourhoods attractive to additional investment. Developers should be required to take into account these existing sites as part of the planning process, coordinate their activities with all relevant city departments, and inform future purchasers about the presence of music venues and clusters.
- 4. Music communities should explore the viability of historical designation or cultural zone designation to bring awareness to the value of individual sites and zones.
- 5. The Agent of Change principle (see page 42) should be explored in areas where there is already a significant number of live music venues.

### Government Policy: Musician-Friendly Policies

- 6. Conduct a needs assessment of your community of musicians, singers, songwriters and producers in order to identify policies that can help them succeed along with key challenges and obstacles to pursuing music as a vocation.
- 7. Inventory the music professionals and businesses available to support artists in their careers including managers, agents and labels.
- 8. Based on these assessments, identify the priority needs and opportunities. These may require financial support, infrastructure spending, training or programs in other areas.
- 9. Identify key public and private sector players who can help deliver programs to meet the identified needs and priorities.

### Music Office or Officer

- 10. Establish a single point of contact whether an individual or team for the music industry within City Hall mandated to:
  - a. Help the music community navigate relevant city government departments and policies;
  - b. Lead the city's music strategy or lead the development of a strategy if one does not exist;
  - c. Liaise with the volunteer music advisory board or commission;
  - d. Help other city employees, agencies and elected officials understand the issues facing the music sector; and
  - e. Mediate between the music community and other community groups in order to resolve conflicts.
- 11. Music should be recognized as a commercial industry, and therefore the officer should be housed in a department focused on economic development.
- 12. Ensure the person hired as a music officer has direct experience in a creative industry, preferably music.
- 13. Engage the broader music community to continuously promote the importance of the music officer/office to ensure sustainability and continued funding.

### Music Advisory Boards

- 14. Establish a music advisory board representing a cross-section of the music community and key decision makers in agencies that have an impact on music (e.g. tourism agencies).
- 15. Enlist the involvement of music industry representatives with larger networks to facilitate two-way communication with government.
- 16. Governments should utilize the music advisory board as a sounding board for legislation, policies and programs, providing members with ample opportunity to study the issues and engage their networks to provide feedback and ideas.

### Engaging the Broader Music Community

- 17. Create opportunities for networking, mentoring and education in order to build relationships and trust within the music community.
- 18. Seek consensus on common issues that will deliver broad benefits across the sector.
- 19. Address issues of conflict and competition behind closed doors in order to present a united front; where consensus cannot be achieved on an issue, do not bring it forward.

- 20. When crisis occurs, use the situation to build support for sustainable music advocacy organizations and sustained engagement.
- 21. Develop strong relationships with elected officials at all levels of government, and of all political stripes to help overcome bureaucratic inertia.

### Spaces and Places

- 22. Conduct an inventory of existing rehearsal spaces, recording studios and live music venues, noting their capacity, primary uses, licensing conditions, cost to access, quality of sound and lighting, and accessibility to transportation and parking.
- 23. Based on the inventory, identify gaps in the venue ladder and other music spaces, and identify potential public and private partners, as well as underutilized buildings that may be repurposed to fill the gaps identified.
- 24. Clusters, hubs and accelerators in their many forms can make efficient use of resources and expertise, while establishing an environment where artists are nurtured and respected. Investigate the opportunity for projects in your community.

### Audience Development

- 25. Live music strategies should include specific goals to expand access to all ages events and facilities.
- 26. Joint marketing of live music events should be coordinated by music associations, cities or tourism agencies, to ensure information on the full breadth of available options is available music fans.
- 27. Transportation planning must take into account the night economy in order facilitate access both to and from live music events.
- 28. Artist mobility should be enhanced in order to expose remote or segregated communities to a variety of music for its social and cultural benefits.

### Music Tourism

- 29. Together, the music community, city and tourism officials should identify the available music tourism assets including music heritage sites, live venues and festivals, and initiate policies and programs that support their continued operation and growth.
- 30. A Music City brand should be developed with the involvement of tourism experts in conjunction with the local music community, in order to ensure its authenticity.
- 31. Music tourism should be defined as a distinct category in tourism impact studies, in order to better identify music-specific opportunities and challenges.



### SECTION VI CONCLUSIONS

here is growing recognition of music as a transformative power, not only as a cultural staple, but also as an economic driver for cities. The outsized impact of music on both the lifestyle and economic fortunes of places like Austin and Melbourne has become a beacon for other cities. Artists and businesses in the music industry, after more than a decade of difficult adjustment to the digital revolution, are eager to seize – and share – the opportunities.

Boosting the music economy brings multiple dividends to communities, from advancing artistic and cultural growth, to generating substantial economic impacts from job creation and music tourism spending, thereby increasing GDP. A vibrant music economy creates the quality of life that makes people want to live and work in a Music City, giving these communities an added edge in business attraction and retention.

The proven strategies outlined in this report can help communities of all sizes seize the opportunities offered by music. To do so, members of the music community, government and larger business community should all get involved. Together, they can develop a plan that builds on existing assets and overcomes areas of challenge and friction.

Music Cities around the world can also benefit by working together. During the research for this report, it became clear that there is a great deal of interest in sharing best practices. Reports like this one are intended to facilitate that, as are many of the music conferences that take place around the world. Similarly, there is an eagerness among music community members to share knowledge and build a dialogue – an aspiration that came to the forefront during focus groups for the report. With organization and a willing host, this could be facilitated on a larger scale.

This spirit of sharing and cooperation, in combination with well thought out strategies, gives hope that many more Seattles, Berlins and Bogotas – Music Cities – will take root all over the world.

### SECTION VII CREDITS

## ABOUT THE AUTHORS

AMY TERRILL is Vice President Public Affairs at Music Canada where she is responsible for government relations, communications and public relations. Amy has been instrumental in Music Canada's efforts to unite a broad coalition of industry members in Ontario in a bid to promote live performance, music tourism and Toronto as a music city. She has also led the organization's research activities since 2010 which have included the publication of The Next Big Bang – A New Direction for Music in Canada, Accelerating Toronto's Music Industry Growth - Leveraging Best Practices from Austin Texas, Fertile Ground - Alberta Music Cities Initiative and Economic Impact Analysis of the Sound Recording Industry in Canada.

**DON HOGARTH** is a communications consultant with more than 20 years of experience in public relations and print journalism. Don has extensive consulting experience in the music industry, including with Music Canada. His work there has included contributions to several initiatives, among them copyright reform, the organization's rebranding, and the 2013 research report, *The Next Big Bang – A New Direction for Music in Canada*.

ALEX CLEMENT (Research Assistant) is a graduate of the University of Toronto's School of Public Policy and Governance. Alex has worked with Music Canada on their Music City initiatives and has been active in Music Canada's efforts to promote and recognize Toronto's potential as a Music City.

**ROXANNE FRANCIS** (Research Assistant) has worked in the Arts and Entertainment industry for most of her career. She is a graduate of the Music Business Management Program from the University of Westminster where she focused her studies on

Music and Tourism. A native of Toronto, Roxanne is passionate about the city and the diverse spectrum of music it has to offer.

Numerous community and music leaders from around the world made this report possible through a generous contribution of their time, ideas, insights and expertise. Below is a list of those individuals and their affiliations.

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Tsedey Betru, Vice President, Community LIFT, Memphis

Michael Blair, The House of Songs and Scorpio Music Production, Stockholm

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Gareth Donal Gordon, Bogotá Chamber of Commerce, Bogotá

Patrick Donovan, CEO, Music Victoria, Melbourne

Martin Elbourne, UK Music Promoter and Author of Reverb Report on City of Adelaide

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Andrea Goetzke, Cultural Producer, Berlin	David Melo, Marketing Manager, Invest Bogotá
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Bill Harvey, co-founder, NY is Music, New York City	Chris R. Parham, Nashville Mayor's Office of Economic and Community Development
Emmanuelle Hébert, Department of Culture, City of	
Montreal	Don Pitts, Music Program Manager, City of Austin
Graham Henderson, Music Canada, Toronto	David Porter, President/Founder, The Consortium MMT, Memphis
Bart Herbison, Executive Director, Nashville Songwriters	
Association International, Nashville	Dylan Rice, Director of Creative Industries – Music,
	Department of Cultural Affairs and Special Events, City of
Jennifer Houlihan, Executive Director, Austin Music People,	Chicago
Austin	Chain Chanira Managing Director Cound Diplomagy
lan James, Managing Director, Mushroom Music	Shain Shapiro, Managing Director, Sound Diplomacy, London, UK
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, abiliting, webbarne	Fredrik Sandsten, Event Manager Music, Göteborg&Co,
Till Kniola, Referent für Popkultur und Filmkultur (Pop and	Gothenburg
Film Culture Representative), Culture Department, City of	
Cologne	Butch Spyridon, President and CEO, Nashville Convention
	and Visitors Corporation, Nashville
Andre Le Roux, SAMRO Foundation, South Africa	
	Nikula Stuba, Cultural Director, City of Helsinki
Lutz Leichsenring, Clubcommission, Berlin	
	Mike Tanner, Music Sector Development Officer, City of
Tom Kiehl, Director of Government and Public Affairs, UK	Toronto
Music, London	Andrew Vincent, Musician, Ottawa
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Tennessee Film, Entertainment and Music Commission,	
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	de Paris
Juan Luis Restrepo, Department of Culture, Recreation and Sport, City of Bogotá	

Additionally, some of the above contributors participated in one of two international focus groups.

#### Focus Group 1 – February 2, 2015

Patrick Donovan, CEO, Music Victoria, Melbourne David Grice, Managing Director, Musitec, Adelaide Juan Luis Restrepo, Department of Culture, Recreation and Sport, City of Bogotá Butch Spyridon, President and CEO, Nashville Convention and Visitors Corporation, Nashville John Wardle, Director, Live Music Office, Sydney

Focus Group 2 – February 3, 2015

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Jennifer Houlihan, Executive Director, Austin Music
People, Austin
Andre Le Roux, SAMRO Foundation, South Africa
Ignacio Priego, Concerts SA, South Africa
Shain Shapiro, Sound Diplomacy, United Kingdom
Andrea Goetzke, Cultural Producer, Berlin

The focus group sessions were led by consultant Erik Lockhart of Queen's University in Kingston, Canada to whom we are grateful for his moderation. Participants joined both sessions by phone and online. The focus groups helped verify our initial findings, identify gaps, and rank the following: the benefits accrued to cities with music-friendly and musician-friendly policies; the fundamental building blocks or assets for a music city; and, the most effective music strategies.

We wish to thank the many people who gave willingly of their time and ideas in the research for this report. The enthusiasm with which the focus groups were approached, in particular, suggests that there is a great deal of interest in further exchange of ideas and best practices in Music Cities around the world.

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DE COMMERCE DU CANADA







Earlier this year, the
Canadian Chamber of
Commerce invited Graham
Henderson, president &
CEO of Music Canada,
to speak to our board
members about the
concept of Music Cities - a
multi-faceted approach
to growing the local music
economy. Music Cities is a
concept that has already

grabbed the attention of a number of communities and chambers of commerce across the country.

What community doesn't have an event focused on music? Or isn't home to local artists and musicians, and music entrepreneurs? Large and small centres have jamborees, choral festivals, jazz festivals, blues festivals and more! Music venues and recording studios dot the landscape. And artist entrepreneurs live among us, coming out to play whenever stages are provided. One only has to look to the recent example of the Tragically Hip's final tour to get a sense of the impact, influence and importance that music plays in our lives and our communities.

When our board was introduced to this concept by Music Canada and the pivotal role that chambers could have in creating an opportunity for growth for their businesses and communities, they were ... well... all singing from the same songsheet.

We are so pleased that Music Canada has partnered with us and shared their excellent work in this space with the chamber network as a tried and tested economic development tool. It is our hope that you will be able to take content from this toolkit and use the ideas within to reach new segments of business in your community as you reach out to potential members and partners for the chamber; to create economic platforms within your community that strengthen its profile and growth and to bring even greater value through your chamber as the connector of people and innovative solutions.

In the end, Music Cities is a concept which everyone can get behind. After all, who doesn't like music?

Perrin Beatty, President/and CEO

The Canadian Chamber of Commerce



Cities around the world are increasingly recognizing the powerful punch delivered by music as a driver of employment and economic growth that further enhance its long-acknowledged cultural and social impacts.

Music Canada, a trade association representing Canada's major record labels, is proud to be at the forefront of this global movement. Following a successful campaign to place music on the economic development agenda in Toronto by highlighting the best practices from Austin, Texas, Music Canada produced the first international study of municipal music strategies. Since its publication in 2015, The Mastering of a Music City has been used to guide the formulation of new music strategies in communities around the world, been consulted by leading music industry and municipal leaders in some of the best known Music Cities, and been added to curricula at numerous academic institutions.

At the heart of the research is the idea that music can play a pivotal role in the economic development of any community, not just the titans of the industry like Toronto or Austin. It starts with leadership.

We are extremely pleased to be able to work with the Canadian Chamber of Commerce whose pan-Canadian network makes it an ideal partner to spread the thinking behind and the benefits of adopting the Music Cities model for your community. Music is a universal concept - it goes beyond words, beyond geographic and political boundaries and has the potential to create new circles of influence for the chamber network. I encourage you to lead the way and help your community become a Music City.

Graham Henderson, President and CEO

Music Canada

## INTRODUCTION

Cities around the world are increasingly recognizing the potential of music as a driver of employment and economic growth beyond its long-acknowledged cultural and social benefits.

Music Canada, a trade association representing Canada's major record labels, campaigned for Toronto to leverage music to benefit its economy based on the strategies deployed in Austin, the capital of Texas. It pointed out that Austin is much smaller than Toronto, the hub of Canada's recording industry, but that it was using music far more effectively to generate jobs, taxes and growth. The campaign secured the engagement of city hall, and the Mayor of Toronto, John Tory, put music at the heart of his economic development agenda.

This successful campaign prompted interest from other cities in Canada and around the world, looking for a "roadmap" so that they, too, could tap into the power of music. Music Canada and its global affiliate, IFPI, published a report in 2015 entitled *The Mastering of a Music City*. It sets out simple steps that policymakers worldwide can take to help develop their music economies.

The report was based on more than 40 interviews with a wide array of experts in music and government on all continents, citing examples of best practices from 25 cities worldwide. The report also sets out seven key strategies that will help local authorities, businesses, community groups and the creative sector capitalize on the potential of music to build, grow and strengthen their cities.

Music and municipal leaders in communities as diverse in size and demographics as Gander; London; Calgary; Vancouver; Columbus, Ohio; Sydney, Australia; Aarhus, Denmark and Bogota, Columbia are utilizing *The Mastering of the Music* 





City to guide their own local strategy development. Even Austin, Texas is using the research, among other things, to guide its latest efforts to support the music community.

The Music City conversation has also spread to business improvement associations and chambers of commerce. These organizations are looking for ways to play a leadership role in the development of their own "Music City."

Building on the experience of Music Canada's Executive Vice President, Amy Terrill, both in chamber management and in her role as a leading advocate/consultant on Music City development around the world, this toolkit has been designed by Music Canada to provide Canadian chambers of commerce with a roadmap and guide to activate the power of music in their city.

"Growing our music industry is key to driving economic growth, job creation and investment. A city's passion for music is important in attracting talented people to visit and to stay. The Mastering of a Music City report reinforces, in my mind, the real potential of what supporting the music industry can do to transform and grow a real 21st century city."

- John Tory, Mayor of Toronto

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# WHAT IS A MUSIC CITY?

The term "Music City" is becoming widely used in cultural communities and has penetrated the political vernacular in many cities around the world. Once identified solely with Tennessee's storied capital of songwriting and music business, Nashville, Music City now also describes communities of various sizes that have a vibrant music economy that they actively promote. Alliances are being formed among cities that see value in partnering to enhance their music success, Music City accreditations are being discussed and defined and Music City panels are popping up at conferences around the globe.

Outside the cultural community, there is growing recognition among governments and other stakeholders that Music Cities can deliver significant economic and employment benefits beyond the long-acknowledged cultural and social benefits. Quite suddenly, there is a lot of interest in becoming a Music City, and how to make one succeed.

In Canada, cities from Gander to Victoria are examining ways in which they can adapt the Music City model for their community. Chambers of commerce have an opportunity to carve out a leadership role as this dialogue is emerging.

What are the essential elements of Music Cities?

- · Artists and musicians
- A thriving music scene
- Access to spaces and places
- · A receptive and engaged audience
- Record labels and other music-related businesses

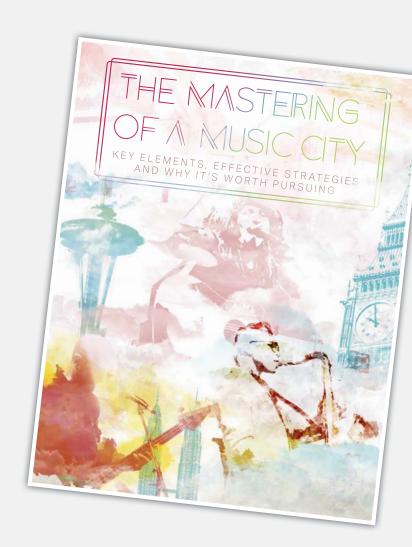
It is also important to have multi-level government support for music, a broader municipal infrastructure conducive to the sector and music education programs. Many other beneficial elements were identified in the research for Music Canada's *The Mastering of a Music City* report, including music history and identity. However, the above-noted components received a higher ranking by the focus groups conducted for this research.



## **EFFECTIVE STRATEGIES**

The Mastering of a Music City report identifies seven key strategies that are an effective means to grow and strengthen a city's music economy:

- 1. Music and musician-friendly policies, from licensing and liquor laws, to parking and planning regulations, to affordable housing and artist entrepreneur training.
- The creation of Music Offices to help musicians and music businesses navigate the broad range of government policies and regulations that impact music.
- The formulation of Music Advisory Boards to engage the broader music community in a collaborative way and to facilitate dialogue with municipal governments.
- 4. Engaging the broader music community to ensure the people most affected by music policies are involved and informed.
- 5. Access to spaces and places, whether public or privately owned, for artists to practice, record, and perform at every stage of their career.
- 6. A focus on audience development, ensuring there is an engaged and passionate audience for local musicians as well as international touring artists, now and into the future.
- 7. Music tourism or the development of a Music City brand to leverage a thriving live music scene, rich music history or large music festivals in order to reap the significant benefits associated with music.



# BENEFITS FOR THE COMMUNITY

A vibrant music economy drives value for cities in several important ways: job creation, economic growth, tourism development, city brand building and artistic growth. A strong music community has also been proven to attract other industrial investment, along with talented young workers who put a high value on quality of life, no matter their profession.

Here are some examples of tangible benefits derived from a dynamic, thriving music sector:

- Music tourism is big business in the U.K. According to the U.K. study Wish You Were Here: Music Tourism's Contribution to the U.K. Economy, approximately £2.2 billion in direct and indirect spending was generated by 6.5 million music tourists across the U.K. in 2012, generating the equivalent of 24,251 jobs.¹
- Live music companies in Ontario generated a total of 10,500 full-time equivalent (FTE) jobs as a result of their direct activity, the activity of their suppliers and re-spending of labour income in the wider economy. The tourism activity generated by music festivals creates over 9,500 additional FTEs.<sup>2</sup>
- Music can play a powerful role in building a city's brand. For a select group of cities, those with the strongest music scenes or a deep music heritage, music is a big part of who they are. Think "Liverpool," and most people think

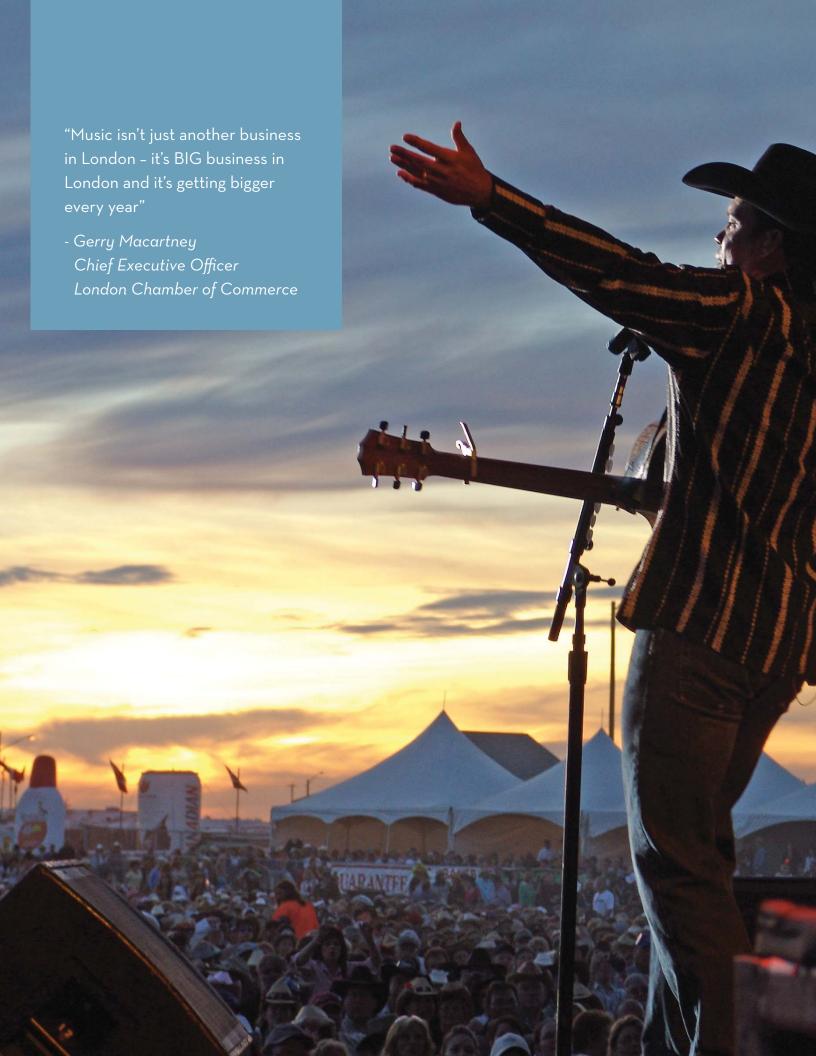


"The Beatles." Think "Memphis," and music icons like Elvis and Johnny Cash come to mind. Austin's familiar tagline is "Live Music Capital of the World." Nashville is, simply, "Music City."

- Music plays a role in attracting and retaining talent and investment in a city's broader economy. The world's top talent is highly mobile today. For many cities, putting their best foot forward to attract well-educated and talented young people is a major challenge in an environment of intense global competition. Music can be a big part of recruitment success.
- Music is a strong social unifier. It builds bridges between cultures and languages, connecting people within a city, a region and across borders.

<sup>1</sup> U.K. Music, Wish You Were Here 2015; Music's Contribution to the U.K. Economy, June 2015.

<sup>2</sup> Music Canada, Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario, December 2015.



# BENEFITS FOR THE CHAMBER OF COMMERCE

In Canada, at close to 3% of total GDP, the creative industries make a larger contribution to GDP than traditional industries such as agriculture, forestry and fishing, electricity, gas, water and waste services, and accommodation and food services. They employ over 647,000 people across the country.

In a 2013 report on the province's economy, the Ontario Chamber of Commerce identified music as one of Ontario's three key sources of competitive advantage.<sup>3</sup>

The music industry in Canada is made up of tens of thousands small and micro businesses and some large businesses. These businesses and professionals contribute to all aspects of the creation, performance, promotion and distribution of music. They include artists and musicians, artist managers and agents, record labels and publishers, recording engineers and studios, festival organizers, venues and promoters, radio stations, music stores and digital services. Artists are essentially entrepreneurs, often with very little traditional business training since much of their professional development is focused on their musical talents.

As a sector that is traditionally not engaged with its local chamber of commerce, music represents a potential growth area for business support, community economic development and membership.

This also represents an opportunity for these entrepreneurs to learn and network from the "established" business community. Many chambers run small business training sessions at a low cost for their members. Given the focus for many musicians is the music, these courses would be beneficial from a number of perspectives.



Ontario Chamber of Commerce, Emerging Stronger 2013, January 2013.

# **GETTING STARTED**

## CONFIRM YOUR MISSION

- What is it you want to accomplish?
- Do you want to contribute to the economic success of your community through music?
- Do you want to facilitate the retention and attraction of music industry professionals?
- Do you want to engage a new sector of your economy in order to enhance the representation of your business community?

All of these may be possible, but you must define what you want to do.

## **BUILD YOUR NETWORK**

Before you begin, you must first identify the key music stakeholders in your community and other key allies. A few will be obvious, and, quite likely, already known to you, while others will not yet be on your radar. Begin with the known community members and ask them to connect you to their networks.



## Music stakeholders:

- Music festival organizers
- Music venues
- Local promoters (who bring shows into venues that they rent)
- · Recording studios
- Record labels
- Artist managers
- Agencies
- Musicians and songwriters
- Music and record stores
- Music educators post-secondary, private schools

## Allies:

- Tourism agencies
- · Investment agencies
- Downtown business organizations
- Hotel/motel associations
- Local arts councils
- Local radio stations including college radio

## **TEST THE WATERS**

Convene a small group of these stakeholders in order to discuss the potential program, providing ideas of the various actions that you would like to lead and securing buy-in and support. Members of this initial group could be helpful steering committee members for a thought leadership event or future music policy task force members.

# ACTION ITEMS: THE VARIOUS ROLES FOR THE CHAMBER OF COMMERCE

## 1. CATALYST

The chamber of commerce is the leading voice of business in a community, acting to enhance economic prosperity and quality of life. In this leadership role, the chamber can act as a catalyst to stimulate the "Music City" discussion.

The London, Peterborough and Guelph chambers of commerce have assumed this role in their communities. The Calgary Chamber of Commerce hosted an event to launch an Alberta music study in 2014.



### Recommended Action:

Organize a thought leadership event that brings together key community leaders and organizations that could play a role in a Music City effort. Leaders from other Music Cities can be brought in to provide inspiration or speak to best practices.

#### Intended Outcomes:

- Raise awareness about music as a source of jobs, investment and skills, an important driver of tourism and city branding, and a social unifier
- 2. Connect the music community with the broader business community
- 3. Highlight local music community strengths and areas of opportunity
- 4. Identify best practices from other communities

#### Potential partners:

- Municipal leaders opening address by mayor, key councillors and staff
- Tourism agencies
- Investment agencies
- Key music organizations local venues, festival organizers, recording studios
- Artists speaking and performing roles
- Downtown business organizations
- Hotel/motel associations
- Local arts councils
- Outside municipal, provincial or national leaders - to share best practices - i.e. a local music officer

### Format:

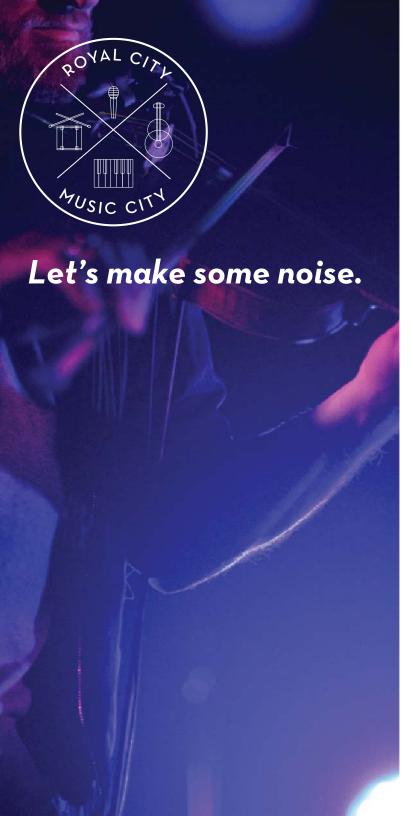
Organize a full-day event that includes keynote speakers, panel discussion and artist performances. Ideally, the event leads to conclusions and recommendations. As an example, the formation of a music policy task force by the chamber, as detailed in Action 2, could be one of the recommendations.

Depending on budget and local chamber practices, it could be a ticketed event or invitation-only.

## Sample program:

The Guelph Chamber of Commerce provides the most recent example of a thought leadership event organized around the topic of the music economy. (See next page.)





#guelph

## MUSIC CITY AGENDA

Official Registration + Reception

11:30 - 12:00 pm

Opening Performance from Alanna Gurr

12:00 pm

Setting the Stage with emcee Hayley Kellett - The Making Box

12:20 pm Kithio Mwanzia - President & CEO, Guelph Chamber of Commerce

Marie Zimmerman - Executive Director, Hillside Festival

His Worship Mayor Cam Guthrie - Mayor of the City of Guelph

Kathryn McGarry - MPP for Cambridge on behalf of the

Ontario Minister for Tourism, Culture & Sport

Lunch

12:50 - 1:20 pm

Keynote Introduction by David Peacock - RTO4

Keynote Music Meets Municipality: Key learning's from The Mastering of a Music City

1:30 – 2:00 pm Graham Henderson - President & CEO, Music Canada

Music tourism and its connection to supporting community vibrancy, artists and businesses is a world-wide trend that has seen strategies developed at the local level to maximize opportunities. Music, and in particular, the live music scenes in communities across the province not only provide great entertainment to a legion of fans, but are an important driver of tourism and economic development.

Intermission Performance from NEFE

2:00 pm

Leadership Panel

2:20 - 3:20 pm Moderator: Rob McLean - Kazolu

Erin Benjamin - Music Canada Live Brian Heatherman - Music Ontario

Robert Leader - JAM School

Q & A

3:10 pm

**Closing Remarks** 

3:20 - 3:30 pm











## 2. ADVOCATE

The growth of a robust music economy is often held back by municipal policies and regulations. Often, as with any public policy, the consequences of these regulations are unintended. As one of the most effective advocates in the community, the chamber of commerce can play a leadership role in organizing the music community and key allies in identifying the areas requiring attention in the local community.

Additionally, advocacy can help to raise awareness about an emerging opportunity, rather than a barrier that requires removal. Music tourism is often overlooked by tourism agencies and yet can be a significant source of spending in the community.

The Greater Des Moines Partnership, the economic and cultural development organization serving central lowa, has a comprehensive view of economic development in its community, which includes a strong focus on the music economy. According to Executive Director Jay Byers, the music scene "is a key component of the region's quality of life and, therefore, an important tool to attract and retain talented workers."

The Partnership, which has 22 affiliated chambers of commerce and 5,800 business members, was an early supporter of the Des Moines Music Coalition, which is a "non-profit organization and collaborative movement committed to building a stronger and more diverse music community in greater Des Moines." In addition, the Partnership supports Des Moines Music University, the 80/35 Music Festival and has had a presence at SXSW Music Festival in Austin, Texas for the past nine years.

## **DID YOU KNOW?**

Music tourism and spending on live music experiences bring big dollars to local communities.

Live music continues to be a popular choice of entertainment in Canada: SOCAN's 2015 financial report revealed 4.9% growth in general and concert revenues to \$39.6 million.<sup>5</sup>

The Ontario Arts Council studied the impact of arts and culture tourists in 2010, concluding that they stay longer and spend more than the average tourist. While the report did not specifically study music tourism, it did find that music performances were the largest tourism driver among all arts activities.<sup>6</sup>

### **Recommended Action:**

Convene a music policy task force to examine municipal policies and regulations that are hampering the creation, production and performance of music in your community. This could be a short-term task force with a specific targeted end-date, rather than a standing committee.

<sup>4</sup> http://www.desmoinesmc.com/about/

<sup>5</sup> SOCAN, Step Ahead, 2015 Financial Report, June 2016.

<sup>5</sup> Prepared for Ontario Arts Council by Research Resolutions & Consulting Ltd., Ontario Arts and Culture Tourism Profile, November 2012.

## a. Discovery

- i. Invite members of the music community to identify policies or regulations that are hampering their business development—this would likely begin with a town hall meeting but could include a survey tool when the music community members are identified
- ii. Host information exchanges with key municipal staff and the music community, providing an opportunity for both sides to understand each other's objectives

#### b. Refine

- Determine the top three to five policy barriers that present a reasonable opportunity for resolution
- ii. Gather specific evidence from the music community to illustrate the problem
- Formulate policy recommendations that would overcome these barriers while still meeting the municipal objectives identified in discovery

### c. Collaborate

- i. Identify potential partners and allies as well as key music community advocates who can help articulate the issues
- ii. Conduct briefings to ensure everyone understands the issues and the key messages

## d. Advocate

- Request meetings with key elected officials and staff to move forward this policy agenda
- ii. Prepare packages, meet and follow through
- iii. Provide music community members with letter or email templates and encourage them to send to city councillors and the mayor

### e. Inform

 Communicate activity and achievement to the chamber membership and the music community

## **DID YOU KNOW?**

According to Live Music Measures Up, An Economic Impact Analysis of Live Music in Ontario, completed for Music Canada by Nordicity, music tourism is driving substantial job numbers in the province and represents an area of enormous growth potential:

- The total economic impact of live music to Ontario's economy was \$1.2 billion in 2013. Live music companies in Ontario were responsible for \$484 million in total expenditure in 2013 and contributed \$432.4 million in taxes to all levels of government combined. The economic impact of live music companies included 10,500 full-time equivalent jobs, and tourism activity accounted for an additional 9,520.
- In 2013, 558 festivals across Ontario sold
   a total of 15.7 million tickets, representing
   7 million unique visitors. Ontario's 616
   venues have a combined capacity of 3.6
   million. The 775 promoters operating in
   the province in 2013 promoted 81,600
   shows, which sold a combined total of 5.4
   million tickets.

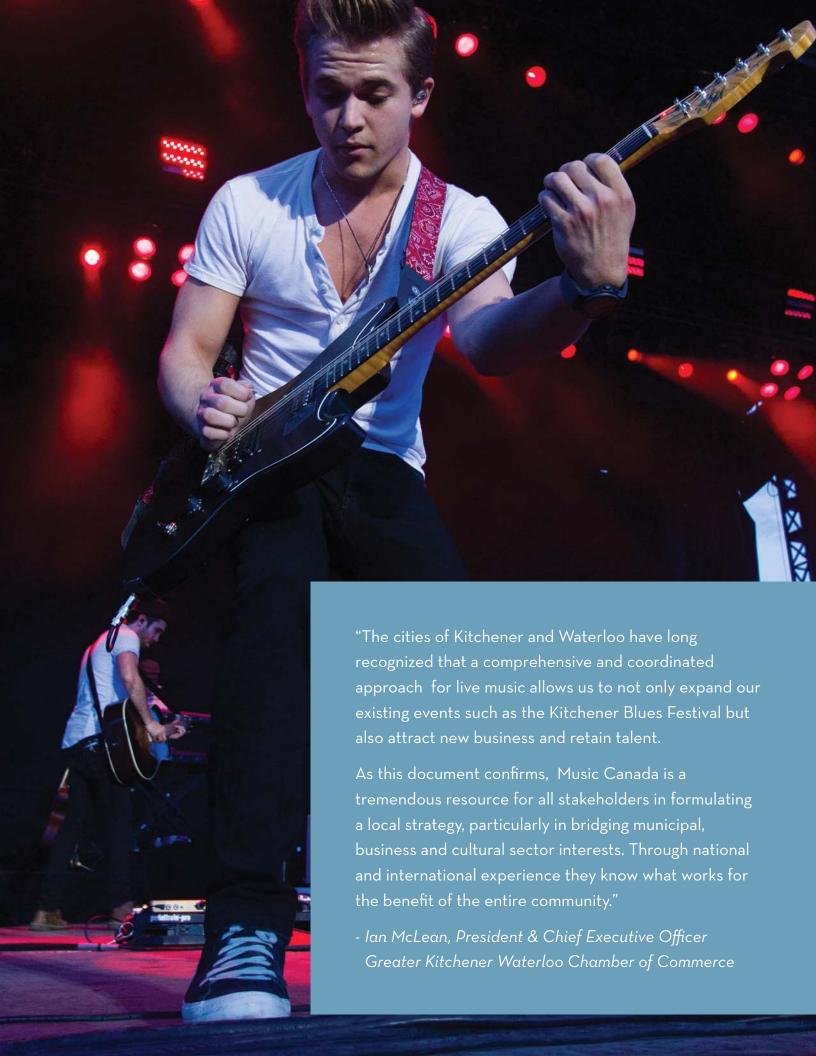
 Just 11% of those tickets were sold outside of Ontario, providing optimism for growth in music tourism results.

There are numerous examples of music's financial impacts in British Columbia, including these two diverse examples of a large and a small festival:

- In 2015, the Pemberton Music Festival, attended by more than 115,000 patrons, generated more than \$56 million in direct and indirect spending.<sup>7</sup>
- The Shambhala Music Festival in Salmo attracts 10,000 music fans and 1,000 volunteers, contributing an estimated \$20 million to the West Kootenay region's economy.8 The festival's impact has grown rapidly: 15 years ago it attracted just 500 fans. Each year, the festival's organizers generously give back to the community, supporting music education, the construction of local skateboard parks as well as food banks, public libraries and community youth and family centres.

Music Canada, B.C.'s Music Sector: From Adversity to Opportunity. February 2016

<sup>8</sup> Ibid



## 3. OPERATOR

Many city departments have some level of authority over music businesses. Navigating the broad range of government policies and regulations that impact music can pose significant challenges for music communities. Cities that have established a single point of contact for the music community, in the form of a music office or officer, are better positioned to build their music economy and develop effective policies. Currently, music officers exist in several Ontario cities including Toronto, Hamilton and London. Ottawa has a cultural officer who has assumed a key role with the music community.

Chambers of commerce have often filled similar roles in their communities—the closest comparisons would be the special event office or the tourism marketing organization, two municipal functions that have been outsourced in the past to individual chambers of commerce. The synergies with a special event office are so strong that music could be considered an additional component.

For some chambers, a music officer may offer an attractive opportunity.

Typical functions of a music office or officer:

## a. Navigating city hall

A music officer serves as the first point of contact for the music community, providing important guidance and a single point of information regarding the necessary steps to create music events, or secure licences for music-related businesses.

## b. Educator and advocate

A music officer who understands the issues and challenges facing the music community can help to identify red tape and regulatory barriers that are impeding the growth and development of the music industry. Through education and advocacy within city hall with the various departments that have some authority over music, the music officer can help to identify solutions and improvements that will help minimize these barriers.



## c. Lead development of a music strategy

Many successful Music Cities have a comprehensive music strategy that has been developed in conjunction with the music community and has been endorsed by a municipal council. The City of Toronto recently passed a music strategy that was developed by the Toronto Music Advisory Council and city staff and was the subject of a broad public consultation.

## d. Issue management and mediation

A music officer serves as the first point of contact for stakeholders' issues and problemsolving with a focus on industry growth and development. The music officer should be available to assist with issues and disputes from resident associations, BIA's or other stakeholder groups with music-related concerns.

# e. Education/networking programming and events

The music officer can gather information about the music community and serve to promote existing events and facilitate connections. Some music offices organize live music events in city hall in order to raise the profile of local artists and the value of music.

Music officers most often have prior experience in music or another creative sector that gives them invaluable sector knowledge.

## Recommended action:

Design a proposal for the city that includes rationale for the office/officer, key functions and a budget. In a smaller community, this would not be a full-time position.

## 4. TRAINER

As mentioned, the music industry is made up of tens of thousands of small and micro businesses across Canada. It is a highly entrepreneurial sector that has been evolving in a rapidly changing digital environment that has affected all aspects of the industry: creation, performance, promotion and distribution. Artists, in particular, are best viewed as entrepreneurs, operating their own small businesses, sometimes with little or no business training.

Chambers of commerce provide outstanding support to small businesses in the form of workshops, training courses, etc. These services could be extended to the music community, providing a valuable offering that could be used in order to broaden the chamber's membership base.

The Bogotá Chamber of Commerce has prioritized music and other cultural industries as a key economic sector and is developing 30 different services to support these industries. These services include professional development and training.

## **Recommended Action:**

Advertise any small business training programs you currently offer to the music community stakeholders you have identified.

It is also harder than ever to earn a living as an artist. Live performance income has become increasingly important, but touring costs are high. And while labels have tried to protect their investment in artists and repertoire, revenues in the industry have been cut in half since 1999, meaning there is less money to invest in artists. More than ever before, artist income is made up of small increments from a greater number of revenue sources. Understanding where these revenue sources are, and how to access them, is essential to building a career as a professional musician. The chamber can play host to workshops to provide this information in the community, accessing expertise from the music community in larger centres.

## **Recommended Action:**

Host a workshop designed specifically for music entrepreneurs in your community on how to maximize revenue sources in the digital environment. Invite speakers from the broader music community in your province or territory or partner with your provincial or territorial music industry association.

## 5. PROMOTER

Live music events add vibrancy to cities and are an important source of artist income and development. Creating opportunities for musicians to perform need not be the sole responsibility of existing music venues. Public spaces can be effectively used to stage live music events and are often underutilized. The chamber of commerce, given its strong relationship with the local municipality, is a natural host for live music events in city parks and squares.

In addition, there are other ways to celebrate and promote music in a community. Depending on the presence of a local music history story, incorporating music history into existing promotional materials may be an opportunity. Or, the chamber could use existing promotional vehicles to help amplify local music events that are hosted by others. The chamber has a natural audience in its membership that could be made better aware of local music activities.

A related example can be found in downtown Toronto where the Downtown Yonge BIA has developed a comprehensive music strategy focused on the past, present and future. Downtown Yonge's music history is celebrated through a guided walking tour that is conducted by a local music writer, and the BIA is also working with the local historical society to mark former venues with plaques. In its focus on the present, the BIA activates local parks and squares in a live event series that takes place throughout the summer, providing opportunities for hundreds of artists. And its future stream is achieved by working with a local trainer/educator on an incubation project for artist managers, which, eventually, it hopes to expand to artists.

## Checklist

- Are you planning a community event that would be enhanced by live music?
- Do you hire local artists and musicians for your events?
- Are they paid a fair talent fee?
- If you are hiring musicians, have you also paid your SOCAN fees to compensate the creators of the musical work (lyrics and composition)?
- If your event is using recorded music, is the venue properly licensed?

### **Recommended Actions:**

- 1. Assess the availability of parks or squares for the activation of music and consider developing an event series that will increase the vibrancy of your community and give artists more opportunities to perform. Costs can be covered through sponsorship, and one of the music contacts previously identified can help with booking the artists and bands.
- Inventory the music history assets in your community and identify opportunities for celebrating or promoting the musical past.
- 3. Ensure existing promotional vehicles are capturing live music content that is already being produced in your community.

## **DID YOU KNOW?**

The public use of recorded music in Canada requires obtaining necessary licences and permissions.

Playing recorded music in public (including at a commercial establishment) triggers the requirement for a number of licences, which compensate various copyright holders for the use of their music. These licences are obtained from organizations known as collective societies. Without these collectives, users of music would need to get permission from every individual copyright owner.

Playing recorded music in public requires two licences: one covering the musical work (the lyrics and composition) (licensed by SOCAN[1]) and one covering the artist's recording of the work (licensed by Re:Sound[2]).

Chamber of commerce members who play recorded music in their businesses are required to obtain these licences.

When the chamber hosts an event at a venue, licences are also required. Both are typically obtained by the venue, but some larger venues (i.e. convention centres, hotels) may have exclusions in their rental agreements that require the renter to obtain the licences on their own behalf.



# CONCLUSION

A developed music economy contributes significantly to a vibrant, attractive, investment-rich, talent-heavy community. "Music City" strategies are now regularly being discussed by associations focused on economic development, nightlife and downtown business development as they try to learn how they can contribute to the growth of their music economies and how they can leverage music to deliver on larger community goals.

As leaders in community economic development, business training and advocacy, chambers of commerce are poised to assume an effective leadership role in the support and growth of music in their communities. As a potentially untapped

industrial sector for chambers of commerce, music also presents an exciting area of program and membership growth.

With the rapid growth of this conversation, it will come to your community. It's just a matter of time and whether you are in the lead.

## **CONTACT:**

Amy Terrill, Executive Vice President Music Canada aterrill@musiccanada.com



# APPENDIX: TERMINOLOGY

**SOCAN:** SOCAN licenses music in Canada on behalf of songwriters and publishers.

Re:Sound: Re:Sound licenses recorded music for public performance, broadcast and new media and distributes royalties to rights holders through its member organizations directly and through its bilateral agreements with international collective societies.

Provincial and territorial music industry associations: These are member-based, not-for-profit industry associations that tend to represent a cross-section of the music community including artists and bands. They provide a variety of services including information, education, advocacy and networking. There are 12 in Canada as follows:

- Alberta Music
- Association québécoise de l'industrie du disque, du spectacle et de la video (ADISQ)
- Manitoba Music
- Music and Film in Motion (Northern Ontario)
- Music B.C.
- Music New Brunswick
- Music Newfoundland and Labrador
- Music Nova Scotia
- Music Ontario
- Music Prince Edward Island
- Music Yukon
- SaskMusic

"Music in London has become as much of the economic fabric of our community as academics, health care and manufacturing. Long before the advent of the Budweiser Gardens (a.k.a. the John Labatt's Centre) which now host acts as diverse and broad-ranging as Cher to Shania, Sting to Elton John and Billy Joel to Kid Rock - London was laying down the roots of a music industry that today boasts the moniker "The Festival City of Canada". With the earliest offerings of Home County Music Festival and the multinational, world famous Sunfest, today we are blessed with an abundance of festivals that seem never ending. Blues Fest, Beer Fest, Rock the Park, Rib Fest, Jeans and Classics, Spring Bank Gardens Concert Series and the list goes on and on filling our musical entertainment calendars from early May through the end of October".

- Gerry Macartney Chief Executive Officer London Chamber of Commerce





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# **Seattle City of Music**

# A vision for the future of music in Seattle





# Seattle City of Music A vision for the future of music in Seattle

A committee of music advisors to the City of Seattle assembled this document through a series of meetings held during 2007. It expresses a vision and development strategy for Seattle's music industry and the larger community for the year 2020.

This vision and the following recommendations were developed to capitalize on Seattle's rich music history and to propel the city's existing music industry to the forefront of a rapidly expanding creative economy throughout North America. In 2008, the music industry in Seattle directly creates 11,155 jobs, with 2,618 businesses generating an annual \$1.2 billion in sales and \$487 million in earnings. The goal of this document is to create action over the next 12 years that enhances the climate for music and that will reward our city with an even stronger economy and cultural environment.

# A Vision Statement for Seattle in the Year 2020

We value music as a dynamic force that enriches the lives of residents, visitors and listeners around the globe. Seattle will be acknowledged as a distinctive center for music where a spirit of innovation continually renews a thriving music industry, both economically and culturally. The talent of our individual musicians of all ages and musical genres and the engagement of audiences will be the foundation of this city's vibrant music culture. Audiences, business leaders, educators and politicians will enthusiastically support the creative, economic and community value of music.

In creating this vision, a number of topics were identified with broad preliminary recommendations crossing the private, not-for-profit and government sectors for developing Seattle as a "City of Music." These topics have been arranged into three categories reflecting key aspects essential for fulfilling this vision: **City of Musicians**, **City of Live Music**, and **City of Music Business**. Components relevant to each category are briefly noted here as a catalyst to future development.



# **Seattle City of Musicians**

In 2020 Seattle will provide music learning opportunities at national leadership levels for recreational, educational and professional development. Musicians around the country will recognize Seattle as a highly desirable place to live, create and perform.

### Components include:

- **K-12 Education and After School Programs:** Music education programs will be provided by all public schools, as well as through neighborhood community centers and independent organizations.
- **Higher Education:** Local colleges will lead the nation in music education and performance.
- **Professional Opportunities for Musicians:** A professional development structure will be established to support musicians who want to make a living-wage career playing music in Seattle, including teaching and mentorship.
- **Livability for Musicians:** Musicians will have access to health care and will be able to afford to buy a home and raise a family in the city through a career in music.
- Creating Community Among Musicians: Fellow musicians of all genres will support one
  another and work together to advance their craft, their professional community and their
  role in the city.
- **The Musician in All of Us:** The people of Seattle will value music in everyday life and enjoy chances to expand personal involvement with music.



# **Seattle City of Live Music**

In 2020 Seattle residents and visitors will have increased opportunities to experience the power and pleasure of live performance in a multitude of ways. Seattle will be acknowledged as a premier site for performers - both local and international. The variety and quality of performances encourages audiences to encounter music in a multiplicity of settings and styles.

### Components include:

- **Music Festivals for All:** Seattle will encourage public celebration through a wide range of musical events throughout the City's parks and neighborhoods.
- **Audience Engagement and Support:** Residents of all ages will have a range of opportunities to learn about, connect with, advocate for and support live music in Seattle.
- **Facilities for Music:** Seattle will be rich with well-managed concert venues of various sizes, supporting a wide variety of musical performances.
- Connecting our Communities with Live Music: Unconventional and publicly owned spaces
  will be utilized for live music performances and will encourage music as a means for
  community building.
- **Connecting Tourists with Live Music:** Seattle will be regarded worldwide as a destination for exceptional and diverse live music performances, which will be promoted via visitor centers and tourism communication.



# **Seattle City of Music Business**

In 2020 Seattle will have expanded its role as a hub of music innovation, with both commercial and not-for-profit industry leaders having their homes in this thriving environment. Seattle's music business reaches far beyond the City's physical boundaries: radio and online broadcasts, recordings, film scores, soundtracks, etc., will be valued exports that are enjoyed locally, nationally and globally. This role in the economic and cultural prosperity of the City will be supported by an effective and sustainable local infrastructure.

### Components include:

- **Enhancing Business Development and Retention:** The growth of Seattle's music business sector is made a priority among city leaders and developers, and will be continually measured and enhanced through government incentives and support.
- Creating Job Opportunities: Initiatives will be developed across the public/private sector that create and retain music industry-related jobs and aggressively pursue new opportunities to promote business growth.
- Our Technology Sector Assets: Professional networks will exist among Seattle's
  information and communication technology sector to ensure music businesses are at the
  forefront of new technology economies.
- Business Investment and Mentoring: Successful business leaders will recognize and support the contribution of the music sector through investments in new entrepreneurial opportunities and music-related not-for-profit programs.
- Supporting the Sector: Seattle's music industry will be valued and supported for its
  enhancement to the city's tax base and for fostering economic diversity. Educational and
  not-for-profit music will be valued for its important contribution to the continuity of this
  industry and for enhancing the quality of life in the community. Such endeavors will
  receive sustainable financial support from individuals, foundations, government and
  business.



The Seattle City of Music effort represents the vision of a cross section of music interests and entities from indie pop to classical and small music labels to major for-profit and not-for-profit corporations. While this group reflects an extraordinary range of music there is a high level of agreement regarding vision, needs and strengths of the sector. There is untapped potential to enhance music as an economic, educational and recreational force in meeting the needs of the city, and to build Seattle's role in music nationally and internationally.

The capacity of Seattle's musicians, music organizations and industries is growing. While this group recognizes not every aspect of this vision will be realized, there is great interest and enthusiasm for harnessing this creative momentum in a way that is coordinated for maximum economic and cultural benefit to all. While there is great optimism there is also awareness of the challenges. This document outlines the key findings of this process to help inform and shape a vibrant future for music in Seattle.

Prepared September 2007 by the Seattle Mayor's Office of Film and Music, James Keblas, Director. Consulting provided by Claudia Bach, AdvisArts. Based on the work of the Music Advisory Committee, including:

- Leslie Beattie, Amazon
- Carri Campbell, Seattle Public Schools
- Elena Dubinets, Seattle Symphony
- John Gilbreath, Earshot Jazz
- Stewart Hallerman, Avast Studios
- Shellie Hart, KUBE 93fm
- Holly Hinton, Hear Music
- Jason Hughes, Sonic Boom Records
- Jon Kertzer, Microsoft
- Sara Liberty-Laylin, Seattle Public Schools
- Ben London, Pacific Northwest Chapter of the Recording Academy
- Tom Mara, KEXP

- Andrew McKeag, Musician
- David Meinert, Fuzed Music
- Jason Milstead, Real Networks
- Josh Rosenfeld, Barsuk Records
- David Sabee, Seattle Music
- Chukundi Salisbury, Seaspot
- Michele Scoleri, One Reel
- Steven Severin, Neumo's
- Susie Tennant, Town Hall
- Shana Weydert, ADA
- Adam Zacks, STG/Sasquatch!



# Music Industry's Economic Impact to Seattle and King County

### Direct economic impact of the local music industry

In 2008, the music industry in Seattle directly creates 11,155 jobs, with 2,618 businesses generating an annual \$1.2 billion in sales and \$487 million in earnings. It is estimated that the industry in Seattle generates \$90 million annually in state and local sales and B&O taxes.

Within the larger King County economy the music industry directly creates 20,193 jobs, with \$2.2 billion in sales and \$840 million in earnings. The industry in King County generates at least \$148 million in tax revenues.

# Indirect and induced economic impacts of the local music industry

When the indirect and induced impacts of the industry are considered, the number of jobs supported in Seattle rises to 22,391, sales are \$2.6 billion, and labor income is \$972 million. Considering King County, the impact grows substantially with 38,862 jobs supported, sales of \$4.6 billion, and \$1.6 billion in labor income.

### **Key Findings:**

- Exports represent \$495 million or 40% of the sales of the industry, bringing in new money to our regional economy and supporting jobs that would not be here if the music industry was not present.
- Seattle's strong technology sector has contributed to the greatest change in the industry and provides the greatest growth for jobs and wages in the region, including globally significant companies with a substantial music business such as Real Networks, Amazon.com, and Microsoft.
- Total economic impacts as measured by sales and labor income, are larger in the current study than reported in the 2004 study. Sales increased by 17%, labor income rose by 72%, and earnings per worker rose by 75% to \$43,691 annually.

# MANIFESTO FOR THE NIGHTIME ECONOMY

PHILIP KOLVIN QC

# INTRODUCTION

At the heart of every great town or city is a great night time economy.

The NTE is worth £66 billion to the UK economy. It provides jobs for over 1.3 million people.

But its benefits go far wider.

Cities are among the finest achievements of humankind: they are highly evolved and complex spaces in which people live, work and play. But take away one element, and no city is worthy of the name.

The leisure economy is a big part of the reason why people move to cities, including workers and students.

It is fundamental to the tourist draw of the UK. It is the inspiration and foundation for much of our creative industries – fashion, music, media and performance.

It is the driver for supply chains of vital importance to local economies including food and beverage, transportation, retail and security.

As shopping progressively moves online, it is fundamental to the vitality and viability of our high streets. Without it, many of our city centre streets would be lonely and dangerous places at night. Without it, many streets would enter spirals of decline.

Most importantly, the leisure economy is where, after the stresses of ever longer working days, we meet, eat, socialise, drink, dance, learn, laugh, fall in love, celebrate, and behave as we were born to behave, as social animals.

But night time economies are like gardens. They need to be planned and tended. Otherwise they may grow wild or even decay.

This manifesto lays down some simple messages for the development of vibrant, sustainable night time economies.

# A NIGHT TIME ECONOMY FOR ALL

Whether in a major capital city or a small market town, there are key features of a great night time economy.

First, it attracts every sector of the population, regardless of age, race, gender, sexuality or physical or mental ability.

Second, it caters for every interest, whether that is eating, drinking, dancing, music, performance or merely gathering.

Third, it is attractive to all income groups. Nobody should be excluded from the night time economy on grounds of wealth.

Fourth, it should be accessible, whether by public or private transport, or on foot, at all hours.

Fifth, it should be safe and amenable, through good signage, lighting, access and security; for a diverse range of users throughout the day and night.

The principles are easy to state. The goals can only be attained through partnership, planning and investment.

# **THREATS**

In recent years, there have been some key trends which threaten our night time economies.

First, there has been an increasing trend of drinking at home, fuelled by price differentials between the on- and off-trade.

Second, the ability to purchase leisure services on-line, whether films, sporting events or gambling services, has increased the relative attractiveness of home consumption of leisure.

Third, increasing parking charges and reduced night transportation services are impediments to city centre use at night.

Fourth, increased habitation of city centres, which ought to help the night time economy, has threatened it. Where dwellings are built near to leisure premises, whether with planning permission or as a result of permitted development, local authorities come under pressure to reduce the hours, impact or even existence of the leisure facilities. Increasingly, leisure premises are being closed and sold off for housing, so reducing the number of facilities while increasing the local population wishing to use them.

Fifth, and most important, the key regulatory tool of the night time economy is licensing, which tends to be a reactive tool, whereas the main tool in the day time economy is planning, which works proactively. While planning is about place-making, licensing is about place-keeping. This must be resolved, for otherwise great night time economies will happen in spite of rather than because of the work of public authorities.

That is why the purpose of this manifesto is to restate the value of the night time economy and the principles necessary to foster it.

# **VISION**

A great night economy is unlikely to happen and will never be sustained by accident. It must be planned. And to be planned there must be a vision. The vision must then be translated into action by gathering the power and talents of all the agents of change – public authorities, investors, leisure operators, transport providers and residents representing all population sectors and interests.

The partnerships must have access to all levers of control – planning, regeneration, licensing and policing, to drive the economy towards the shared vision.

Manifesto pledge 1:

Every town and city shall have a vision for its night time economy.

# NIGHT TIME CHAMPIONS

Every town and city should have a night time champion. In some cities it is called a night mayor. In others, there is a night time economy commission. In some, there is just a highly effective individual, be it a mayor, a leader or a local authority chief executive, who is invested with the power and authority, or who simply has the leadership and charisma, to bring parties together to develop the vision and then drive towards it.

Without a champion, action happens in silos, initiatives fall on stony ground, apathy and frustration set in, and so the seeds of decline are sown. With it, results can be rapidly achieved, as the city, harnessing all talents, acts as a magnet for investors, creative operators and new city centre users, and so great spaces are born.

# Manifesto pledge 2:

Every town and city shall have an identified night time champion.

# **PARTNERSHIP**

A successful night time economy both serves and protects at least three groups of people – those who work in it or one of the industries serving it, those who use it and those who live and work around it. Some people fall into two or even all of these groups.

The industry is driven by creative and entrepreneurial people, investors and landowners.

The urban fabric comprising the night time economy is driven by statutory planning authorities and regeneration agencies.

The industry is regulated by policing, planning, licensing, environmental health, health and safety and trading standards authorities.

For an economy to be planned in which creativity finds its outlet, entrepreneurship is rewarded, investment is made worthwhile, users are stimulated, workers are employed and residents protected, all of these constituent elements must be brought together in partnership, clustered around the vision, sharing the goals, finding the balance between vibrancy and protection.

However visionary the makers, a regulatory system which is geared to squeezing out growth will cause their vision to fail. However idealistic the vision, unless it is tethered to realistic economic planning it will remain unrealised.

Partnership is therefore at the root of a successful night time economy.

# Manifesto pledge 3:

Every town and city will bring together a partnership of planning and regulatory authorities, operators, entrepreneurs, landowners, residents and users to drive and realise the vision.

# NIGHT TIME ECONOMY STRATEGY

Every town and city has a housing strategy, a retail strategy, a regeneration strategy, even a waste strategy.

Yet, despite the important role and function of the night time economy, few towns and cities have a leisure economy strategy.

To have a vision is commendable, but without a strategy to attain it, it is a chimera.

While licensing policies set out the principles by which the leisure economy is to be **regulated**, few set out the principles by which it is to be **promoted and developed**, **let alone protected**. For example, what uses are to be developed in which places, according to what management policies over which hours?

This must change.

Every good strategy starts with:

- A baseline assessment of current provision.
- An assessment of needs.

There are many ways of assessing needs. But a starting point may be to survey not only the population which visits the centre at night, but the population which doesn't. Why not? What is the constraint? Diversity, cost, safety, access, rival centres?

From the assessment, the strategy must then set out the practical steps by which the vision for the centre is to be attained.

# Manifesto pledge 4:

Every town and city will produce a leisure strategy, to attain the vision for its night time economy.

# **PLANNING**

The planning system is key to the promotion of sustainable leisure economies.

At a central level, national planning policy must reinforce the cultural and economic value of the leisure economy.

The local planning framework must:

- Translate the leisure strategy into practical planning policy
- Identify the zones for development of leisure facilities.
- Promulgate policies to encourage such development.
- Identify leisure assets of value to the community.
- Protect such assets against loss or threats from incompatible development.

In recent times, planning policy has encouraged the development of residential uses in town and city centres. This is a positive trend.

However, leisure uses are now being lost to residential development, and new residential users are pressurising authorities into preventing new leisure uses or curtailing the rights of established uses. Planning authorities have a key role in ensuring that an appropriate balance is maintained between the development of residential uses, the protection of established leisure uses and the development of new leisure uses. The success of our towns and cities depends on the needs of one group not being permitted to predominate over the needs of another.

In the case of new residential uses, the planning system can assist by effective spatial planning so that residential uses are not planned next to late night facilities, by requiring construction measures to minimise nuisance, or by requiring developers to waive rights to complain of nuisance.

# Manifesto pledge 5:

National and local planning policies shall recognise the value of the night time economy and be oriented to promote and protect it.

# DESIGN

Urban design is fundamental to the creation of attractive and safe spaces and buildings for people to visit at night.

This depends not only on set-piece central squares, but attractive places to dismount, the access routes to the centre, the lighting, the interaction with vehicular traffic, the signage schemes, the architecture of new developments, the sense of arrival in the centre, the drama and excitement of the layout and the treatment of facades.

Even where there is little to spend, much can be achieved by modest upgrades to the street scene, planting and lighting schemes and signage, to bring a sense of care and unity to an otherwise neglected centre.

# Manifesto pledge 6:

Every town and city centre will be designed, so far as possible, to enhance the experience of users of the night time economy.

# VOLUNTARY MEASURES

Increasingly, the industry has come to recognise that the regulatory system is a safety net to ensure that operators do not fall below minimum standards. Minimum standards are necessary but insufficient to create great, safe customers experiences.

And so, voluntary measures have been developed which define new standards of excellence in the industry and which create mechanisms to attain such standards. And other groups and agencies have worked to increase the standards and protections within the night time economy. These include:

- Best Bar None.
- Purple Flag.
- Pubwatch
- PASS.
- Business Improvement Districts, including Night-Time Bids.
- Taxi marshalling schemes.
- Street pastors.
- Approved Contractor scheme for security providers.

Such schemes improve the standards of each operator subscribing to them. Widespread operation encourages the remainder to raise their standards through peer and customer pressure.

# Manifesto pledge 7:

Night time operators will promote and support voluntary local schemes raising standards of operation and protection.

# **LICENSING**

The licensing regime is designed to further the licensing objectives (prevention of crime and disorder, prevention of public nuisance, public safety and the protection of children from harm) through a system of premises and personal licensing.

Individual decisions are made having regard to local policy and national guidance.

In general, the licensing system is not managed so as to recognise the value of the night time economy, or to translate vision or strategy into decision-making. Where there are policies dealing with the locality, these tend to be negative (such as cumulative impact policies) rather than positive, recognising the importance of the area to leisure provision in the centre concerned, or the importance of particular assets in the life of the community. The concept of proportionality, whereby the regulatory objectives of the authority are balanced against the cultural, community, economic or employment value of the asset or proposal, is often misunderstood or ignored.

In order for licensing to be aligned with the leisure strategy for the centre, it is essential that licensing policy recognises the value of the night time economy, states what it supports as well as what it opposes, translates the leisure strategy into practical licensing proposals including zoning and other measures, and commits the authority to regulating in the least intrusive manner so as to promote and not stifle investment in the leisure economy.

# Manifesto pledge 8:

National and local licensing policies shall recognise the value of the night time economy. Local licensing policies shall aim to promote the vision for the night time economy, translate the leisure strategy into policy, and advocate regulation by the least intrusive measure consistent with promotion of the licensing objectives.

# REGULATION

The system of regulation, whether through licensing, policing, environmental health or health and safety, is an indispensable means of protecting the public through recognising and enforcing against non-compliant practice, and rooting out the worst operators.

However, over-used, the regulatory system can impose unsustainable costs on businesses, deter investment and drive out operators. The aim must always be to recognise and take a light touch with good operators, aim to improve the management practices of other operators and seek to close or curtail operations only as a matter of last resort.

Before enforcement action is taken, there should be a documented partnership process to improve management practices, including formal action plans and audits of compliance with such plans. Licensing authorities should make clear that, except where urgent action is necessary, they are unlikely to take regulatory action except where documented action plans have failed.

Authorities should also commit to taking measures to improve management in preference to action to curtail or close operations, unless draconian action is genuinely needed on the facts of the individual case.

Authorities should recognise that, since leisure facilities admit members of the public, and particularly where alcohol is sold, there will always be some crime and disorder, and some level of intoxication. Furthermore, it is inevitable that there will be some level of disturbance of residents who live in town and city centres where night time uses occur. These facts are not by themselves sufficient reasons to review, let alone curtail or close, night time operations. The litmus test is usually whether venues are managed appropriately to control such occurrences.

# REGULATION

Examples of poor regulatory practice are reviews, summary reviews or closures based on:

- Single incidents of violence which occur without fault on the part of management.
- Crime statistics produced without:
  - ~ Analysis of whether the crime occurred.
  - ~ Analysis of whether the crime has been correctly classified, e.g. GBH or common assault.
  - Analysis of whether the crime occurred at or because of the venue, or is merely the reported landmark.
  - Analysis of whether the level of crime is excessive having regard to the hours and days of trade and the average footfall.
  - Analysis of whether the levels of crime are a function of diligent reporting or bad management.
  - Consideration of whether it is appropriate to base reviews upon them. For examples, levels of reported theft are rarely if ever a relevant basis for a licence review.

Regulatory action is often taken on the basis of minor assaults which have gone unreported or because a minor crime scene has not been preserved. Practice and police requirements in these regards vary significantly across the country. Each police force should publish its reporting and crime scene preservation protocols in partnership with the industry.

# Manifesto pledge 9:

Regulatory action should not be taken before partnership measures have been exhausted, except in urgent cases. Such action should be based on transparent, consistent and agreed evidential standards.

# CHANGING PERCEPTIONS

The heightened attention placed on regulation in recent years, together with negative press attention, have conspired to cast the night time economy in a poor light, deterring many who would otherwise be occasional or even regular users. This helps to perpetuate a user monoculture which then perpetuates the same negative image.

Local authorities, land-owners, investors and operators must work together to change the perceptions of town centres through social marketing and positive press relations. To begin to lure back those who otherwise avoid centres at night, partnerships should create positive city centre events such as late night shopping, night markets, food markets, civic celebrations, light nights, illuminated park nights, carnivals and fairs.

# Manifesto pledge 10:

The public and private sector must work together to change the perception of town and city centres so as to build the diversity and spending of night-time users.

# INTEGRATION

Many who leave their work in town and city centres do not come back in at night. Some who use centres during the day, e.g. to shop, do not come in at night at all.

A successful strategy for town and city centres involves a high degree of integration between leisure and other uses.

For example, there is no reason why services such as shops, medical facilities, libraries and art galleries cannot operate on one or more nights per week so as to produce greater synergies with the leisure economy.

The effective abolition of happy hours has meant that fewer people occupy town and city centres during the crucial "bridging" hours between the end of office hours and the start of night time hours. But not all happy hours are undesirable, and permitting leisure facilities to attract workers based on price will help to create a bridge between day time and night time businesses, retain a diverse customer base in the centre, and reduce preloading at home.

# Manifesto pledge 11:

Town and city centres must aim to integrate leisure and other uses so as to promote customer cross-over and create bridges between the day- and night-time economy.

# TRAINING

UK leisure is the powerhouse of our economy. It lies at the heart of our tourist draw, the employment of our youth, our creative and cultural industries, the regeneration of our towns and cities, and our reasons for living there in the first place.

As such, the lack of a harmonised, unified system for qualifications is an enduring lacuna, which would not be tolerated in any other regulated industry. While there are disparate training courses offered by a vast range of employers and training providers they often lack external validation and benchmarking, duplicate resources, and leave hospitality workers as mere workers when they ought to be a respected profession.

Worse, there are no national vocational qualifications for regulators, whether licensing or police officers, councillors (who are the policy- and decision-makers), or magistrates.

The development of common standards of training and education in the industry needs to be a priority, so that all those involved, whether as employees, licensees or regulators, are working to a common set of standards.

# Manifesto pledge 12:

The industry will participate in a set of qualifications forming a path of career development for all those working in, regulating or otherwise involved in the night time economy.

# To support or comment on the Manifesto follow **#NTEManifesto** on Twitter or visit **Cornerstone Barristers** on LinkedIn.

# PHILIP KOLVIN QC



Philip Kolvin QC is Head of Cornerstone Barristers and a Patron and past Chairman of the Institute of Licensing.

He is the editor of a number of books on the leisure economy, including Licensed Premises: Law, Practice and Policy; Sex Licensing; and Gambling for Local Authorities, Licensing, Planning and Regeneration.

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# **MISSION STATEMENT**

### **Mission**

Launched in 2004, the UNESCO Creative Cities Network (UCCN) aims to strengthen cooperation with and among cities that have recognized creativity as a strategic factor of sustainable development as regards economic, social, cultural and environmental aspects.

By joining the Network, cities acknowledge their commitment to sharing best practices, developing partnerships that promote creativity and the cultural industries, strengthening participation in cultural life and integrating culture in urban development plans.

The UNESCO Creative Cities Network covers **seven creative fields**: Crafts and Folk Arts, Design, Film, Gastronomy, Literature, Media Arts, and Music.

# **Objectives**

The UNESCO Creative Cities Network aims to:

- strengthen international cooperation between cities that have recognized creativity as a strategic factor of their sustainable development;
- stimulate and enhance initiatives led by member cities to make creativity an essential component of urban development, notably through partnerships involving the public and private sectors and civil society.
- strengthen the creation, production, distribution and dissemination of cultural activities, goods and services;
- develop hubs of creativity and innovation and broaden opportunities for creators and professionals in the cultural sector;
- improve access to and participation in cultural life as well as the enjoyment of cultural goods and services, notably for marginalized or vulnerable groups and individuals;
- fully integrate culture and creativity into local development strategies and plans.

### Areas of action

The objectives of the UNESCO Creative Cities Network are implemented both at the level of the member cities and at the international level, notably through the following areas of action:

- sharing experiences, knowledge and best practices;
- pilot projects, partnerships and initiatives associating the public and private sectors, and civil society;
- professional and artistic exchange programmes and networks;
- studies, research and evaluations on the experience of the Creative Cities;
- policies and measures for sustainable urban development;
- communication and awareness raising activities.



# **Katowice Music Strategy**

An Action Plan To Develop a Vibrant, Sustainable and Economically Prosperous Music Industry in Katowice, Poland

FINAL REPORT

Prepared by: Sound Diplomacy





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# 1. Executive Summary

From acapella miners songs in the 1950s to blues music in the 1970s, hip-hop in the 1990s and modern electronic music today, Katowice has always been at the forefront of developing new music in Poland. With its rich history as a key manufacturing base and its modern make-up as City of Music, it is time for Katowice to emerge as a national leader in music making and music business. To do so will fully capitalise on the talent that is being incubated within its inner and outer borders.

The production of this study and the denomination of Katowice as a UNESCO City of Music and entrance into UNESCO's network is the first step of many to professionalise, develop and ultimately better communicate what has been developing in Katowice for many years. With its world class music colleges and universities and musical heritage across blues to hip-hop, metal to a-capella, Katowice has always been a music city. Now, with this strategy as its guide, Katowice can also be a music business city and capture market advantage not only in Silesia, but throughout Poland.

Over eight months of extensive research, it was discovered that while Katowice is exploding at the seams with music, events and festivals, it lacks a number of requirements that are needed to develop and sustain a healthy music and music business ecology. While musicianship is high across its educational institutions, very little business skills are being taught alongside; its festivals and open-air concerts are world class, but it lacks grassroots music venues; and while there is a significant amount of support available to develop new content, little is provided strategically to market and export that content.

As stated in the strategy, the purpose of Katowice's music strategy is sixfold:

- 1. Identify and map the music ecosystem in Katowice.
- 2. Refine public sector tools that support music and music making in Katowice.
- 3. Develop clear strategies to encourage more music business infrastructure in Katowice
- 4. Ensure that Katowice's local policies are music- and musician-friendly.
- 5. Create more economically-prosperous artists and businesses in Katowice.
- 6. Develop the most forward-thinking music business ecosystem in Poland

In doing so, it was found that the formal business skills and ecosystem to support them did not match the level of talent in Katowice. In addition, the structure of the city how it interacts with music makers, business people and creatives – was not fully realised. Mapping the pathways for musicians and emerging entrepreneurs to settle and prosper in Katowice lacked specificity. Finally, international networks that can benefit Katowice's constituents needed improvement, especially across music industry networks and frameworks. As a result, 50 recommendations have been posed across a number of themes, including artist and talent development, governance and international networking to benefit the work in Katowice.

It is recommended that these recommendations be introduced steadily alongside the development of the Music HUB, a commitment of the UNESCO designation. We have outlined the roles and responsibilities of the Music HUB in reference to the recommendations, as well as outlined a timeline of actions and a budget framework to carry them forward.

Lastly, and most importantly, is the role of Katowice's artists and business people in the study. A comprehensive survey and interview process revealed a number of opinions, strengths and challenges, all of which are contained in this report. It is them that we must listen to and act for, across genre, discipline and career stage. This is who the recommendations are for and who they will benefit.

In five years time, Katowice will not only be Poland's most innovative music city, it will be a model across Europe and the UNESCO network in how to develop music and music business simultaneously through civic engagement, activism and collaboration.

The following key recommendations will be referred to throughout the study:

- 1. Katowice needs more grassroots music venues.
- 2. Katowice needs a music business education framework.
- 3. Katowice needs to analyse its festivals in a more supportive manner.
- 4. Katowice needs a world class music hub, complete with a music governance structure, monthly meet-ups, training and a program of music business development with international content.
- 5. Katowice needs to provide better access to rehearsal spaces and studios and support them better.
- 6. Katowice needs to better promote its music tourism offer.
- 7. Katowice needs to promote more industry harmonisation, trust between practitioners and more openness across its communication platforms.
- 8. Katowice needs to translate its offerings in town more effectively (museums, festivals, signage).
- 9. Katowice needs a transparent funding structure and system.
- 10. Katowice artists need better international contacts and promotion.
- 11. Katowice needs more international music business.

### 1.1. Theoretical Framework

Katowice is a modern, post-industrial city in Southwestern Poland with a population of 301,834. It is the capital of Upper Silesia, a region with over 2.2m people. It is the central hub of a number of smaller cities and towns in Upper Silesia, serviced by three international airports, as well as national rail and road links. It is one in an advantageous geographic location in Europe, sitting in between both Eastern and Western economies, traditions and history. For many years, Katowice has had a robust, talented music community, from world-class classical and jazz music education institutions to some of Europe's most storied pop and rock festivals. It is a young, educated city, boasting five major national universities, two of Europe's most exciting new festivals and a world-class concert hall, NOSPR. The creative arts sector is developing as well, from video game development to filmmakers, graphic design and textiles.

In this groundbreaking study, Katowice commissioned Sound Diplomacy to develop a music map and analysis of the city's extensive, talented music ecosystem. While it is a city of emerging creatives, it lacks cohesive, structure to introduce music cities policies to further galvanise and support its musicians and those working with music across multiple disciplines. While there are many opportunities for artists to perform, there are infrastructural and regulatory restrictions to expanding Katowice further into a prosperous music city. These restrictions are affecting the city's talent, industry development, festivals and economic growth of its practitioners.

The Mastering of a Music City<sup>1</sup> is the first report to index a series of agonistic Actions that any city can explore to develop music- and musician-friendly policies to improve economic development, city growth, retention of talent, tourism, and branding. They are:

- 1. Music and Musician-friendly Policies
- 2. A Music Officer
- 3. A Music Advisory Board
- 4. Access to Spaces and Places
- 5. Engaging the Broader Music Community
- 6. Audience Development
- 7. Music Tourism<sup>2</sup>.

This study takes these seven pillars into consideration in its research on the music community in Katowice. *The Mastering of a Music City* also noted five essential elements every city must have to engender music city initiatives. They are:

- 1. Artists and musicians;
- 2. A thriving music scene;
- 3. Access to spaces and places;
- 4. A receptive and engaged audience; and
- 5. Record labels and other music-related businesses.

Furthermore, two factors overarch Sound Diplomacy's report:

- 1. Community Cohesion;
- 2. Policy Understanding and Engagement.

Katowice benefits from having the five essential requirements of a music city in bounties. It boasts internationally-recognised spaces and places and a receptive audience, as noted through the 1.7m attendees, annually, to its local festivals. However, there are many avenues through which these variables can be improved – as exemplified through our interviews and surveys with Katowice's musicians and music professionals – which inform the actions positioned.

However, Katowice's strengths are more in presentation of talent than incubation of talent. Its capital expenditure, from a city level, on music is focused on festivals, rather than venues, studios or rehearsal spaces. There are very few places musicians and music businesses can meet to network and very little guidance or mentorship on one's development in music, other than classical or jazz training. As a result, Katowice is famous in Poland for training some of the country's most talented musicians across all genres, however its contribution to the country's label, management and business ecosystem is not as significant. Yet, the city is at the crossroads of Poland and in prime position to incubate and create Poland's next great record label, tour promoter or festival.

There is a now a need to look at how Katowice is educating its next generation of musicians and encouraging those interested to pursue music as a career. With world-class musical understanding, this report maps the strengths of Katowice's musical ecosystem while unearthing and explaining the challenges the city faces, and how it can tackle each of these challenges. This report is genre neutral and agnostic, and is not concerned with any specific festival, program or initiative. Nor is it meant to deprioritise the value and importance of the other artforms active in Katowice's cultural community, all of whom share experiences with music. However, these Actions are geared towards; music business infrastructure, sector mapping and economic impact analysis, tracking and support provisions geared towards business development, regardless of the path each constituent and stakeholder wishes to pursue.

This landmark study - the first in Poland - attempts to provide tangible, cost-effective strategies that, when implemented, transform the locality into a more communicative, friendly and collaborative place for musicians, business owners, politicians and consumers to experience and develop the music ecosystem.

# 1.2 Key Issues Include

- A. Make-up of music industry and amount of managers, labels and other industry professionals, compared to the amount of artists present in Katowice.
- B. Music industry education and skills development among musicians.
- C. Industry trust and collaboration experience.
- D. Relationship between the public and private sectors in the promotion, dissemination and support of music and music industries.
- E. Emergence of Poland as a primary music market and the role of Katowice in the national sector.
- F. Availability of suitable music venues for emerging artists.
- G. Performance opportunities for local artists at recognised festivals.
- H. Networking opportunities for and capabilities of the local music industry.

### 1.3 UNESCO Bid

In July 2015, Katowice City Council and The City of Gardens Cultural Institution, applied to be a UNESCO City of Music. This application is founded on the city's transformation from a city of heavy industry to a city of creative industries, led by music. As a result, it became apparent that a research framework was required to understand the music industry in Katowice: the industry's history, relationship with the infrastructure of the city and the general health of the music sector in Katowice. For Katowice to become a City of Music, it must support music from start to finish; music education, availability and ease of space such as studios and rehearsal spaces, a robust venue infrastructure, healthy music industry organisations and a robust, modern music economy and ecosystem.

Katowice was awarded the UNESCO City of Music on 11 December 2015, further validating the importance of music to the municipality.

### 1.4 Acronyms

Here are a list of the acronyms used in this report:

**IKKMO** – City of Gardens - Instytucja Kultury Katowice - The City of Gardens Cultural Institution

NOSPR – Narodowa Orkiestra Symfoniczna Polskiego Radia

IPIUM – Instytucja Promocji i Upowszechniania Muzyki

### 1.5 Katowice – Census Information

Katowice has an urban population of 301,834. Of this, 192,198 are of working age. It is a very young city, with 8% of its population under the age of 14 and 35% of its population under the age of 35. Its GDP, per capita in 2012, shows the average earnings per working-age citizen was €13,000, showcasing a city with a low cost of living. While Katowice is a middle-income city in Poland, it has emerged over the last 15 years from a manufacturing and heavy industry focus to a more creative industries and soft power focus. It hosts many of Poland's most extensive cultural institutions.

# 1.6 Defining Katowice's Music Ecology

Katowice is a city built on its musical heritage. From its coal mining history of choirs and folk songs to the blues explosion of the 1960s and 1970s, rock and metal in the 1980s and hip-hop and electronic today, Katowice is a city that expels music, from its festivals to public squares. It boasts some of the largest and most successful festivals in Poland, from OFF to Rawa and Tauron. It is a young city, with 19% of the population under 29 ³, 100,000 students in the city and 180,000 in the province ⁴ and a rising GDP, increasing by 3.3% since 2005. It is now a UNESCO City of Music and has led one of the most expansive music regeneration projects in Europe, regenerating a former coal mine with a state-of-the-art concert hall, conference centre and festival space. Katowice has an aging population, with the percentage of 18-29 year olds declining since 2002, according to official government statistics. As a result, there is a need to develop increased entrepreneurial, business-minded cultural policies and initiatives, and with the breadth of music already evident in Katowice and greater Silesia, this study is very timely.

The cultural sector in Katowice is significant and its music industry is one of the sector leaders. In 2014 the city contributed up to €45 million in grants for culture. Additionally, €37,275,000 was directly invested in infrastructure, including the renovations of cultural spaces. €2 million went to programs run by Camerata Silesia, Ipium Silesia and NOSPR, and €48,000 was shared between amateur choirs, orchestras & the Philharmonic.

In Katowice's music survey in 2014, an estimated 6,154 musicians and professionals currently live and work in Katowice. The majority of them also have secondary employment, both inside and outside the music sector. Of those employed full-time in the music sector, 70% in Katowice are supported through public sector grants and programs; including cultural organisations, properties owned and operated by Katowice and music-focused academic institutions.

In addition, Katowice has 24 concert halls, 30 grassroots music venues, 7 local record labels, 12 recording studios and between 5 and 10 music managers. A total of 27 festivals dot the city. In total, the Katowice City of Gardens Cultural Institution contributes €3.7m of support for music-related activities, focused mainly on its festivals and music education strands.

As stated in the Katowice's UNESCO application, "music plays a significant role in Katowice's rich history. It is underground and subversive, framed on a long tradition of amateur choirs and orchestras, skillful, contemporary composers, conductors and musicians, including Kilar, Górecki, Knapik, Zimerman, Szalonek and Fitelberg. It is also home to an active blues music community in the 1980s led by Rawa Blues Festival, a culture of hip-hop and urban music in the 1990s and electronic and dance in the 2000s. It is currently home to some of Poland's most successful alternative bands including The Dumplings, Achimira and Coals, as well as two of Poland's largest contemporary music festivals, OFF and Tauron".

Furthermore, "Katowice has some of the oldest, most prestigious music education institutions; enduring organ, violin, brass and mandolin traditions; and a variety of music awards and competitions, like the Fitelberg International Competition for Conductors (World Federation of Music Competitions member since 1982). Katowice boasts internationally-recognized chamber music ensembles like the Silesian Quartet and orchestras including Polish National Radio Symphony Orchestra (NOSPR)".

<sup>3</sup> http://stat.gov.pl/spisy-powszechne/nsp-2011/nsp-2011-wyniki/ludnosc-i-gospodarstwa-domowe-stan-i-struktura-spoleczno-ekonomiczna-czesc-i-ludnosc-nsp-2011,11,1.html

<sup>4</sup> http://urbact.eu/katowice

## 1.7 Polish Context

It is important for Katowice to understand where it sits in the Polish context, as well as the international context. These are not mutually exclusive. The music ecosystem in Katowice and Silesia does not operate in a vacuum. Its economic generation is based both on local, national and international artists performing at its festivals and venues, as well as being listened to in the headphones of its inhabitants. There can never be a case to separate internal music industry growth from the externalities that influence it. Externalities being, but not limited to, usage of mediums for streaming and downloading, to the interconnected live music infrastructure that supports the mid- to large-scale concerts and festivals in the region. In Poland, Katowice is smaller than Warsaw and Krakow, the two largest cities and centres for the collective Polish music industry. Competing with these cities is not possible nor is it recommended. Katowice offers different strengths, both of which can be augmented and fashioned to support the greater music ecosystem in Poland. In addition, Katowice is the 5th largest touring market for international acts in Poland (behind Warsaw, Krakow, Poznan and Gdansk). It must understand its place within this circuit and how it can better influence and support an increase in international tours across Poland and Eastern Europe in general. However, Katowice, like its sister cities in Poland, responds to the same challenges and industry factors differently.

## 1.8 International Context

It is evident that there are strengths in certain aspects of Katowice's music ecology, its summer festival offering, for example. However, if weaknesses in other industry areas are not understood and approached, they have the potential to adversely impact the aforementioned strengths. The strengths and weaknesses of the international, hybridised music industry impact those performing and working with music in Katowice, as it does everywhere else. The knowledge base required for practitioners is growing as revenue streams diversify and reporting procedures become increasingly complex. As a result, analysis of Katowice's music ecosystem is also an analysis of the city's, and its policies' place within the global music industry.

# 1.9 Principles Underpinning This Report

The principles that are listed below form the backbone of the Actions that follow in this report and are reflected and influenced by the interviews and surveys that were carried out. Without these simple, integral strategies, it will be difficult to implement any of the Actions and further develop Katowice as a global leading, modern and vibrant music city.

# 1. SIMPLE, COHESIVE AND COMMUNICATIVE POLITICAL LEADERSHIP

Katowice's policymakers and city officials must speak with one united voice in relation to music and the creative economy, both at home to its citizens and abroad to its partners.

# 2. DEVELOP AND MAINTAIN TRUST TO FOSTER NEW LASTING PUBLIC / PRIVATE SECTOR PARTNERSHIPS

The music industry in Katowice, across all its nodes and crevices, must foster a collaborative, friendly and supportive relationship internally, to maximise resources across all its avenues.

### 3. SUPPORT THE NEW AND EMERGING

Katowice must ensure it has intensive, structured support infrastructure for its developing musicians. Grassroots music venues, start-ups as well as entrepreneurs and students will support the professionals of the future.

# 4. ANALYSE, AUDIT AND REFINE

All activity in the city should be tracked to recognise and understand its impact on the

local economy, the environment, secondary and tertiary industries. Katowice must place robust, structured analysis at the heart of all its initiatives.

# 5. FOSTER AND SUSTAIN PUBLIC / PRIVATE PARTNERSHIPS

The weight of public support in Katowice outweighs and often stifles the private sector development in music. This must be balanced to support entrepreneurialism over state support.

# 6. BRAG AND NAG

The City of Gardens Cultural Institution must communicate the value of its assets locally, nationally and internationally, while consistently offering its voice to larger issues facing the Polish music industry. It must be a thought leader in the sector – across its collective ecosystem.

# 2. Introduction

# 2.1 Methodological Framework

The findings in this study have been developed with extensive consultation of Katowice's local music community across its ecosystem.

Sound Diplomacy undertook a series of primary and secondary research methods to collect reliable data. These methods include desk research along with analysing data provided by The City of Gardens Cultural Institution, this information derived from its UNESCO City of Music application in 2015. We also studied the financial records of The City of Gardens Cultural Institution in addition to visiting Katowice five times (August, September, October, November 2015 and February 2016), attending festivals, film screenings and local venues.

## **ONLINE SURVEY**

The online survey acted as a source of data collection, fundamental to developing a general overview of Katowice's music scene and its challenges. An exhaustive effort was made to gain responses from the music community. The survey was promoted by The City of Gardens Cultural Institution and leading music organisations and related industry bodies, marketed across social media channels and supported by individual email follow-ups.

## **SURVEY**

The survey, in English and Polish, was comprised of 48 questions, specifically suited to establish the following benchmarks:

- Types of music roles fulfilled in the market (artist, label, promoter, etc.)
- Longevity of music businesses in Katowice
- Effect of transport accessibility on business activity
- Employment rates and trends specific to music in Katowice
- Funding availability
- Costs of conducting business
- Availability of professional representation (label, booking agent etc)
- Legal restrictions to venues
- Festival capacity and attendance
- Networking opportunities such as conferences, meeting points, etc.

## **PURPOSE OF SURVEY**

The purpose of this study is sixfold:

- 1. Identify and map the music ecosystem in Katowice.
- 2. Refine public sector tools that support music and music making in Katowice.
- 3. Develop clear strategies to encourage more music business infrastructure in Katowice.
- 4. Ensure that Katowice's local policies are music- and musician-friendly.
- 5. Create more economically-prosperous artists and businesses in Katowice.
- 6. Develop the most forward-thinking music business ecosystem in Poland.

### **GENERAL**

The survey has been completed by 86 creatives and company leaders of the following industry sectors:

- Artists
- Labels
- Festivals
- Managers
- PR/Media
- Educational and private institutions

Responding businesses, primarily companies of less than 5 people, began operations as early as 1974, though the vast majority began between 2010 and 2015, reporting a turnover from 2,000zl into the millions.

# 2.2. Industry Interview

The authors visited Katowice five times to conduct in-person interviews. The industry interviews acted as an integral source of context for the analysis of the online survey. The interviews also helped to inform and contribute to the industry profile, economic snapshot, case studies and recommendations. The City of Gardens Cultural Institution helped to identify a diverse range of artists and industry stakeholders to participate in interviews. These interviews were conducted in-person and over telephone through September 15 and February 2016. Tamara Kaminska, vice-director of The City of Gardens Cultural Institution, was present in the interviews. The 13 interviewees were:

- Agnieszka Młynarczyk, Silesian Philharmonic Orchestra
- Andrzej Kalinowski, local promoter and musician
- Alan Wykpisz, musician
- Irek Dudek, Rawa Blues Festival
- Jakub and Iga Fedak, musicians
- Katarzyna Pryc, Kino Teatr Rialto
- Krzysztof and Stanislaw Lason, musicians
- Łukasz Adamczewski, label
- Maciej Garbowski, musician
- Martyna Markowska, JazzArt Festival
- Przemysław Borowiecki, musician
- Tomek Szabelski, creative and cultural produce
- Wojciech Brzoska, musician/poet

Plus 4 Case Studies (see below) with:

- Miuosh artist
- Aleksandra Rudzka IPIUM
- Artur Rojek OFF FESTIVAL
- Arkadiusz Zyber Katofonia (venue)

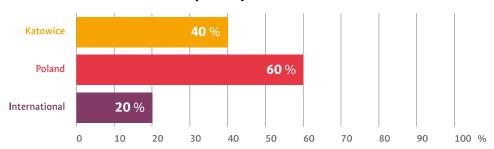
# 3. Survey Findings

# 3.1 **Preliminary Findings**

# STRONG LOCAL SCENE, BUT LACK OF INTERNATIONALITY

Domestic artists, both Katowician and from greater Poland, are being well-represented by Polish music companies through record releases and live shows. However, the great support of local artists does not translate to strong international relations and exchanges. This is detrimental to the export industry, preventing artists and businesses from sustainably establishing themselves outside of Poland. Festivals and booking agents are the strongest potential for an international industry, as they bring import acts to Katowice and Poland and develop ties with international business. These connections need to be transposed for the benefit of Polish artists.

## Where are the companies you work with based?



# STRONG LOCAL TALENT, BUT LACK OF PROFESSIONAL SUPPORT

75% of artists perform a steady stream of shows, anywhere between 11-20 and over 50 shows per year, of which 20% are in Katowice. However, only 14% have a professional representation in the form of a label, agent, or publisher. Despite this, 75% have also released material. Although, more than half have not done so through an accredited source. The remaining cite iTunes, DUX, and Polish radio as their chosen platforms. Genres fall on a wide range, with strong representations in:

- classical
- jazz
- blues
- world music
- rock
- alternative

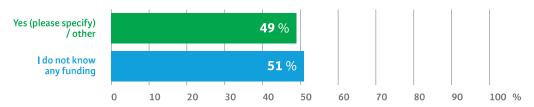
Rehearsal spaces are grassroot and many artists practice at home or in makeshift areas. The Academy of Music provides spaces to many, primarily in the form of agreements between the Academy and its employees and students. Those who hire private facilities pay up to 450 zł per month.

No solid performance payment figures could be quoted, although international artists are paid more than local artists in each case; approximately twice as much. Local artists make anywhere from 400 zł to 1,500 zł for a concert, while international make from 1,000 zł to 2,500 zł per show.

### **FUNDING AVAILABILITY**

Over half of respondents are unaware of any funding availabilities, and of those that are, less than half mentioned The City of Gardens Cultural Institution grant scheme. Those that have received grants from The City of Gardens Cultural Institution, which amounted to less than half of respondents, quoted figures in the thousands (zł), all of which go to the costs of concerts, workshops, and showcases. One company has been receiving steady assistance since 2013.

# Is there any financial support in Katowice for you? If so, please specify in "other".



### LACK OF PROFESSIONAL MARKETING

Marketing and promotion is a struggling area of industry practice, although local marketing is more common than international.

### Local:

- Generally kept under 1,000 zł annually
- A small amount, less than a quarter, spend upwards of 5,000 zł
- Almost half do not spend anything at all

# National/International:

- Three quarters do not spend anything at all
- Primarily conducted through outsourced contacts or as online marketing

International marketing is the key to boosting exports, but many companies do not have the available budget for appropriate marketing. There is also a difficulty in targeting the target demographic for the slightly niche genres of ambient, techno and house that are represented, although these barriers are not as prevalent among classical and popular genres.

## LACK OF NETWORKING OPPORTUNITIES

Less than half of our respondents were able to list networking opportunities. In fact, most 'opportunities' mentioned have not actually come to fruition. Instead, there is potential in company co-operation or post-show networking among artists.

There is a lack of communication between the private and public sectors, in regards to networking, education, or live event opportunities, whether as performer or attendee.

# GREAT LARGE MUSIC VENUES FOR CONTEMPORARY AND CLASSICAL MUSIC, BUT LACK OF SMALL- TO MID-RANGE MUSIC VENUES

Katowice boasts world-class venues such as Spodek and NOSPR, supporting both contemporary and classical music, but there is a lack of small- to mid-range venues for emerging artists. This concern was voiced by many respondents, with one measuring desirable capacities as 250-400 people.

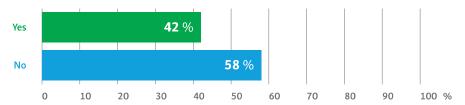
Venues quoted their biggest restrictions, primarily finance-based, as being:

- high security costs
- high rent
- the cost of sound

### LACK OF NIGHT-TIME TRANSPORT

Daytime transport is of little to no concern. Over half of the survey respondents do not live in the city center, but 64% still have less than a thirty minute commute, doing so via car. The lack of public transport in and between outlying districts causes activity to suffer late at night. A concern voiced by many has been transport problems. Lack of evening transport prevents potential audience members from surrounding towns from attending shows. Suburban residents cannot get adequate or reliable return transport from the city, which takes a toll on the music industry through a lack of attendees to evening shows.

# Do you live in the city centre?



### **ASSETS AND LIABILITIES**

Katowice's best assets to the music industry, as determined by those directly involved, are its classical music venues and history. Both the Music Academy and NOSPR saw several nominations, as well as the city's jazz and festival scenes.

The most prominent problems cited were lack of international promotions or opportunities for international relations, a lack of support for developing or niche artists, and lack of communication between institutes and students in regards to networking, performing, or attendance opportunities and education. Other problems mentioned, but not elaborated on, in the above sections, include:

- Lack of an established, reliable local record label
- No ready PA system available, and shortage of venues with a reliable PA system
- Lack of representative artist organization with educational industry tools, such as a union or musician's association
- Lack of representative figures such as managers and publishers
- Lack of promotion and marketing for artists from the city to build export relations

# 3.2 Case Studies

We have completed case studies on 4 different practitioners throughout the process, delivered below:

## CASE STUDY:

# MIUOSH — ARTIST

Mioush is a Polish hip-hop artist based out of Katowice. With two platinum and five gold-certified records under his belt, he has been performing since 2001 with groups such as Projector, Perwer Squad, and, more recently, as a solo artist. He runs his own label, Fandango Records, and helped co-found record/distribution/promotion agency MaxFloRec.

Fandango Records generates a healthy income, spending approximately half of its annual turnover on local and national marketing.

Mioush claims that while Katowice is far away from the musical infrastructure of Warsaw, this distance lends to an increase in grassroots creativity among its citizens.

There is a proud culture of Polish, Czech, German, and Jewish heritage that is incorporated into the city. Musicians are more concerned with the creativity of their music than with its profitability. However, he finds a problem in that too many want to be the creators, the artists, and not enough want to attend to the business side in the form of managers. Existing managers trust too easily and do not look out for the best interests of their artists, as creativity is prioritized over business practices.

Mioush says Katowice, and greater Silesia, has a fear of the small-business and independent sectors, and he finds it difficult to find interns for his company to oversee Youtube activity or simply build contacts. He claims that, unlike Poznan and Warsaw, Katowice has been unable to expand with the times. His own management is in Warsaw, but he offers the example of the existing blues scene as proof that local management is a much more effective strategy.

As someone who began as a curator of events and gigs in local venues, he seeks a better mapping of underground and grassroots locales, a solid music strategy implemented by the city, and an increased appeal of business roles in the industry. He would like an advisory board and steady rehearsal/studio spaces to assist artists in testing their skills in real-life situations

## **CASE STUDY:**

### ALEKSANDRA RUDZKA - IPIUM

Aleksandra Rudzka works at Instytucja Promocji i Upowszechniania Muzyki (IPIUM). In our interview, she detailed her experience in Katowice's classical music scene, outlining her own set of recommendations.

As a part of IPIUM, Rudzka helps host classical concerts in Katowice in collaboration with NOSPR, Radio Katowice, and various museums, all free of cost and amounting to 12–15 chamber concerts per month. They also curate two festivals in the city, August Talents for young artists, and another for young classical artists, both of which are again free. These ventures help artists by providing them access to live music, and the program has spawned the likes of the area's most important opera tenor.

One of the main concerns outlined by Rudzka is the lack of education and international connections. IPIUM boasts a clear definition of genre, but with it comes the clarification of barriers, as the organization seeks a classically-oriented music business school to continue their role as a classical music incubator. International partnerships in the educational, private, and commercial sectors would ease the current difficulty in finding contacts with commercial agencies and press. These partnerships could also be manifested in trade missions and workshops. On an even smaller scale, there are issues in focusing solely on Katowice rather than surrounding cities.

Although Katowice is one of the few cities in Poland to subsidize its concerts, most of the work is by musicians performing other people's music. There needs to be a focus on developing young classical composers, but currently IPIUM needs to apply for special money in order to do so. This would also be abated with a university program or music business course.

Rudzka also mentions competitions, which are an important investment as they act as a continuum. Currently, the biggest occurs between the two big symphony orchestras, both of which are managed. Finally, she calls for free or subsidised rehearsal spaces for musicians.

These are all ongoing concerns voiced by many others throughout the study, but it is telling to see that such as prominent organization as IPIUM faces the same issues, especially in the realms of classical music.

#### **CASE STUDY:**

## ARTUR ROJEK - OFF FESTIVAL

Artur Rojek began OFF Festival in his hometown of Mysłowice after twelve years as the guitarist and lead singer of the Polish rock outfit Myslovitz. He felt Poland needed a means of bringing together the domestic and international music scenes on a platform that celebrated music, rather than a social festival. The first edition, held in August of 2006, saw an attendance of 11,000. He organised three more, before disputes between the Mysłowice city council and the festival forced him to move to Katowice. There was a challenge in that Katowice is not a resort or holiday hotspot, but rather a post-industrial town.

He currently books artists himself, and he is heavily reliant on the internet or recommendations in music shops. He also visits Rother festivals. Since 2016 he's been working with a three-member staff team, they scour through the lists to narrow down the acts chosen, usually between 70 and 80. When ogranising OFF, he maliny relies on pre-existing friends and business partners from his years in the industry.

In Rojek's opinion, keeping the industry self-contained will limit its growth and lead to frustration.

He thinks special institutions — export offices should be set up to promote Polish music abroad. Unlike Adam Mickiewicz Institute, they could focus on music precisely, instead of entire Polish culture. They should be a key figure of support for artists expanding and exporting. To see how they work, Rojek suggests focusing on Icelandic and Scandanavian countries.

### **CASE STUDY:**

# ARKADIUSZ ZYBER – KATOFONIA (VENUE)

Katofonia is a bar, music venue, and recording studio located in the heart of Katowice. Boasting shows ranging from jazz to to blues, funk and rock and roll, the venue hosts six gigs a week, with a jam session every Wednesday.

It cites money as its major barrier to expansion, and wishes it could host more shows. Currently, the venue operates primarily as a bar, which is its main source of income. On gig nights, the bar needs to be closed during sound check, which limits its income on those nights. The venue also faces competition in terms of the amount of venues locally, as well as the proliferation of free festivals. Due to the lack of ticket purchasers, Katofonia finds it difficult to pay artist fees. It operates as an NGO in order to receive funding from the city council, but is a heavy advocate of increasing paid, ticketed events.

The recording studio is a staple of local artist development. From the 400–500 demos it receives per year, the studio hosts approximately 20 artists, each recording 'off the floor' (live). Recording live speeds up the process to a single day for recording and one week for processing and mixing. Although there are 12 studios in the city, Katofonia's generates a profit through its connections with local institutions and its ability to conduct live recordings. It tries to focus on young and emerging bands from the local area who cannot afford the average 1,000zl, including producer and engineer, required to record a song. They also try to work with 4–5 bands on a cost–free basis, but find it extremely difficult due to their existing struggles.

Poland's music industry is very DIY, they claim. There is a sound engineering school in Warsaw (Fryderyk Chopin University of Music), but of the 10 producers Katofonia know, only two have had formal education. This is in keeping with other accounts of Poland's strong, but unsupported, grassroots music scene.

The venue's future plans include a festival in the mountains which will welcome Silesian artists, and organizing a festival-structured competition which will award the winners equipment (although not studio time). Again, the focus is on young artists with limited budgets, hoping to expand the Polish music scene from the bottom up.

Following the survey, a number of key challenges were flagged by the majority of survey respondents. Each is elaborated on and incorporated into the final Actions. They are:

- 1. Katowice needs more grassroots music venues.
- 2. Katowice needs a music business education framework.
- 3. Katowice needs to analyse its festivals in a more supportive manner.
- 4. Katowice needs a world class music hub, complete with a music governance structure, monthly meet-
- 5. ups, training and a program of music business development with international content.
- 6. Katowice needs to provide better access to rehearsal spaces and studios and support them better.
- 7. Katowice needs to better promote its music tourism offer.
- 8. Katowice needs to promote more industry harmonisation, trust between practitioners and more
- 9. openness across its communication platforms.
- 10. Katowice needs to translate its offerings in town more effectively (museums, festivals, signage).
- 11. Katowice needs a transparent funding structure and system.
- 12. Katowice artists need better international contacts and promotion.
- 13. Katowice needs more international music business.

# 4. Actions

## 4.1 Final Actions

The final actions, after the survey analysis and interviews, are listed below. They are separated into infrastructural headings. In total, we have compiled 50 Actions.

In Katowice, as in all of Poland, the role and importance of cultural institutions in developing and fostering cultural programming is significant. This is increasingly important in the success and legacy of the UNESCO City of Music tagline. In Katowice, it is important that The City of Gardens Cultural Institution understands that it is fostering a music ecology, rather than creating or controlling its music economy. It provides the pathways and opens doors from which private businesses benefit. In order to do so, the UNESCO City of Music program must redefine the relationship between Katowice's public and private music sectors, insomuch as defining and promoting a sea of change between them. This change consists of increased collaboration, equal focus on the financial and the cultural sectors, and understanding that each building block of the musical chain, from education to copyright, performance to promotion, is equally important. It also accepts that time, failure, experimentation and collaboration create sustainable music communities. The programming and coordination to celebrate the UNESCO City of Music programme cannot be top down or bottom up; it must combine the two, and this is done most effectively through structured, neutral and politically agnostic strategies, led through one channel and transmitted to as many stakeholders as possible. Here, it is The City of Gardens Cultural Institution that must communicate while all of Katowice's music practitioners, businesses and enthusiasts must listen. In listening, they not only participate in the dialogue, but also create and recreate it through increased networking, skills development focuses and transparent, trackable governance.

These actions are based on this structure. One agency leads through mediation, communication, and structuring, but it does not control. The control and drive lies with the community's stakeholders - Katowice's musicians, festivals, venues, studios and consumers. We must reduce the bureaucracy and barriers to making and promoting music in Katowice in order to turn the city into a national and global leader with its music ecology. These actions, implemented incrementally, will begin the dialogue to establish this.

UNESCO City of Music, to Katowice, should not only represent common interests (goals and a new way forward in the way public and private institutions work together to develop and support the music ecosystem in Katowice), but should also represent a mind-set in how Katowice communicates, internally and externally, to its stakeholders. Every musician, music practitioner and businessperson is a collaborator in this year - and what happens needs to ensure that support systems are examined, reformed and improved in the immediate and interim future. What this report initiates will lead Katowice for the next 10 years.

The Actions are split into three sections, each further divided into several categories, as per the UNESCO City of Music legacy:

- 4.2. Music Hub
  - » Music HUB Structure
    - > Location
    - > Business Plan
    - Staffing
    - > Facilities

- » Actions
  - Organisational Actions
  - > Funding & Financing Actions
  - Marketing & Communication Actions
  - Policy Actions
  - > International Actions
- 4.3. Policy Actions
  - » Governance
  - » Regulations
  - » Venues
- 4.4. Stakeholder Engagement
  - » Education
  - » Tourism & Branding

## 4.2 Music HUB

Enacting the business plan of the Music HUB - initiating it, developing its charter, regulations and structure - is paramount in the success of implementing the UNESCO City of Music strategy. This hub needs to serve all of Katowice's creative communities - music, art, film and creative technology - and be a national leader in Poland in terms of how a city and its institutions, support its developing music economy.

The Music HUB needs to be shaped by like-minded partners around the world, including the St. David's Centre in Adelaide, Australia, The Roundhouse in London or Trempolino in Nantes, France for example, all of which offer support to music and music makers while developing a structure that mixes public and private funding, local and independent governance and structured programming.

The following section outlining the Music HUB is structured as such:

- 4.2a Music HUB Structure
- 4.2b Music Venue Structure at Music HUB
- 4.2c Actions at the Music HUB
  - » Organisational
  - » Policy
  - » Funding & financing
  - » Marketing & communication
  - » International

## 4.2a Music HUB Structure

The City of Gardens Cultural Institution - as a reformed, new structure combining with the Krystyna Bochenek Katowice Cultural Centre - should establish the Music HUB within their new location. It is recommended that it has an initial steering committee that is comprised of the UNESCO advisory committee, municipal employees and private sector workers. This board should consist of odd numbers and be split equally between institutions and private sector.

It is recommended the steering committee/ Unesco advisory committee be:

- 50% female and 50% male
- 10% diversity led, if possible

- No more than 9 people.
- Volunteer, with one year terms.

It is best that the The City of Gardens Cultural Institution consults with its stake-holders and analyzes the Actions on its report to select the staff for the Music HUB.

It is imperative that as many genres as possible are represented on the Unesco board/ steering committee. It will be stated in the charter that the roles and requirements of the Music HUB are genre neutral, but the needs of each genre in Katowice is different, as survey respondents commented. These varying needs must be identified in the Music HUB. It is also imperative that those who have held significant positions in the past are not prioritised over more youthful alternatives; this organisation is new, and its views must represent the breadth of Katowice's music community, not just those that have interacted with funding programs in the past.

The initial structure of the Music HUB must ensure that it does not compete with any other cultural institutions and as such, audits and is aware of all other cultural programming and practice in Katowice. The Music HUB should offer a neutral platform for institutions and the private sector to meet and forge new alliances.

In addition to the structure, all music-related support for businesses and artists in Katowice should be funnelled through this new organisation. This will allow not only for the greatest accumulation of funds by removing operational costs of multiple organisations, but will also provide efficiency in funding applications from qualifying bodies. Key activities in the legitimisation of a sustainable funding body include setting up a standardised approval and denial process, a neutral jury, with a strict timeline, for all applications for funding, and ensuring procedures are adhered to.

### **LOCATION**

It is recommended that the Music HUB be housed in upwards of 3000 square feet of office space, to accommodate the following:

- Record Studio
- DJ Booth (s)
- Networking Areas / Breakout Space
- Meeting Space / Small Venue
- Cafe and Bar
- Rehearsal Rooms
- Editing Suite
- Hot Desks Co-working space

The design of the building should be made public to the Katowice music community for at least 90 days, ensuring that those who wish to comment on what the Music HUB will contain are consulted in advance. This can be coordinated through a page on Katowice's UNESCO website or an online survey. It is integral that the creation and implementation of the Music HUB not be perceived as a 'top-down' affair; it must include musicians and the music community from the onset as proof that the UNESCO City of Music accolade was won to further stakeholder engagement.

### **BUSINESS PLAN**

The first piece of work that the Music HUB should publish is a 5-year strategic plan, which will form the extension of this outline presented as part of the Actions in this report. This business plan will take the initial outline and expand on it, to cost and strategize the implementation of the Music HUB. The following sections must be included in the plan.

### 1. CHARTER

- a. This will govern the manner in which the Music HUB will operate. It will dictate board practices and voting rights, legal and accountancy framework and core responsibilities. Once completed, this document will be a market leader in Poland and could be licensed to other cities, for the creation of other local Music HUBs.
- b. Competition Assessment: It is imperative that the board and its initial executive director complete a competition assessment, to ensure that the objectives and roles of the Music HUB do not entrench on any pre-existing businesses in Katowice and any potential competitive nature be investigated and communicated. A simple list of stakeholders and assets, along with a communication strategy and meeting structure can ensure this is managed effectively and efficiently.
- c. The Music Hub will be open to everyone and the general space will be free of charge. There will be grant schemes for emerging artists to use the studio, and online booking/application systems for the rehearsal spaces, equipment hire and the venue hire.

## 2. TIMELINE

- a. The Music HUB will be run by team members of the "City of Gardens/The City of Gardens Cultural Institution & the Katowice Cultural Institution" plus an external music advisor. The Music HUB will need a Music Hub coordinator, temporary project managers with different backgrounds and expertises and one external music advisor. Communication and Marketing, accounting for the Music Hub will be executed by the City of Gardens internal staff.
- b. Furthermore, a timeline of construction and outfitting, including an ecological assessment to ensure that the activities of the Music HUB are as carbon neutral as possible. The network to manage these activities can be sourced simply and effectively.

### 3. BUDGET

- a. It is advisable that a budget of €100,000 be made available to develop the initial outfitting and structure of the Music HUB. Simultaneously, the Music Hub coordinator, with assistance from consultants and accountants, develops:
  - a1. Fundraising Strategy
  - a2.5-Year Budget
  - a3. Summary of Outgoings and Incomings

### 4. PARTNERSHIPS

a. A significant amount of the required materials for the Music HUB can be sourced through sponsorship and donations, including studio equipment, instruments, computer equipment and furniture. It is recommended that local government and its partners explore this.

### 5. COMMUNICATIONS AND MARKETING STRATEGY

- a. It is important that the Music HUB have its own voice. For this, a brand manual, social media strategy and marketing / communication strategy is required, all in Polish and English (representing the international aspirations of the Music HUB).
- b. It is encouraged that The City of Gardens Cultural Institution rely on their UNESCO City of Music network to assist in disseminating such information internationally. Internal communication can be debuted at a Katowice 'Town Hall Meeting'.

### **STAFFING**

It is recommended that the Music HUB develops the following roles:

1. **MUSIC HUB COORDINATOR** – a neutral, but experienced individual who has local connections as well as experience across Poland and internationally.

## Tasks include:

- Implementation of projects
- Programing
- Overseeing budgets
- Coordination of systems and Music Hub services
- Communication coordination

# 2. TEMPORARY PROJECT MANAGERS & ARTIST COUNSELLING

### Tasks include:

- Managing several different projects and services
- Organisation of events
- Artist counselling
- Music Sector Mapping

# 3. EXTERNAL 'MUSIC ADVISOR', BASED AT THE MUSIC HUB

## Tasks include:

- Managing industry relations, through the Music HUB.
- Networking events
- Implementing policy actions together with The City of Gardens Cultural Institution
- · Capacity building
- Guide development
- Liaising with ZAIKS and the other institutions
- Member of the Unesco Programing Board and responsible for renewing yearly
- Development of Charter of Best Practices
- International Relations

Katowice has many active, engaged and informed cultural institutions, each dealing in a multitude of artforms, including fine art, theatre and dance. However, in the realm of popular music, often a disconnect emerges when comparing tactics against these other artforms, as developing one's music business requires different skills than what is often demonstrated. As such, it is recommended that a 'Music Advisor' post be created, or augmented, at The City of Gardens Cultural Institution, which will focus the music practitioners to one person responsible for developing and establishing the UNESCO music board and associative policies, as well as forming a dialogue between Katowice's music community and its administration. The Music Advisor will have a seat on Katowice's UNESCO music advisory board, but be independent of it. In saying this, the role is not necessarily filled by a municipal government employee, but does involve working very closely with the local governments as well as private institutions in the area. This person must work in a genre-neutral capacity, focused on business development, rather than cultural programming. Cultural programming is best left to a the Music Hub coordinator. The Music Advisor will be responsible for all industry engagement, as itemised in the Actions below.

## 4.2b Music Venue Structure

### STAFF STRUCTURE

As a branch of the Music HUB, it is at the discretion of the offices whether management should be sourced from existing Music HUB staff or outsourced as a separate entity. All operational decisions should stem from the office regardless.

### **ADMINISTRATIVE STAFF**

### 1. VENUE MANAGER / BOOKING

Roles include:

- Implementation of policies and strategies
- Reporting venue performance in terms of attendance and revenue.
- Booking bands and run events at the venue.
- Overseeing the venue calendar, communicating updates to the web staff.

# 2. ACCOUNT MANAGER WITHIN THE CITY OF GARDENS CULTURAL INSTITUTION

Roles include:

- Maintaining budgets
- Keeping accounts books on costs/profits
- Reporting margins to administrative staff/Music Hub
- Checking nightly income reports
- Filing end-of-year tax statements

# 3. FREELANCERS

Roles include:

Web maintenance - creates/maintains venue's online platform with coherent calendar, booking system, contact page, and updated links

# 4. PR & MARKETING TEAM

Roles include:

- Acting as public representative of the venue at community and industry events such as panels and Music HUB meetings
- Liaising with the web team to streamline physical and digital campaigns as well as manage social media accounts

## **GENERAL STAFF**

## 1. DOOR STAFF

• Operating on zero-hour contracts

# 2. PRODUCTION CREW (FREELANCE)

• Including stage manager, lighting technician, and sound engineer familiar and efficient with the building's equipment.

# 3. BAR STAFF (IF APPLICABLE)

Part-time basis during the evening

# 4. SECURITY

- On the evening on a zero-hour contract basis
- Includes door staff, backstage security and in-crowd authorities
- Can consist of volunteers (see below).

### 5. ARTIST LIAISON

- Securing the artist's rider, if applicable, and providing on-evening assistance
- Could be an opportunity for work placement, as detailed in later sections.

### 6. MAINTENANCE

• Engineers/plumbers/etc fixing any technical problems with the sound or lighting boards or physical structural damage.

## 7. **VOLUNTEERS**

- Optional additional staff on event evenings to assist in increased business activity.
- Opportunity to collaborate with local universities to provide students with hands-on live industry experience, even if as crew members, or encourage community involvement from a creational rather than consumer approach.

### **LICENSING**

It is imperative that Music HUB ensures the venue has obtained all operational licenses to coincide with local regulations. The following are standard considerations:

- Performance/recorded music license (UK equivalent PRS/PPL)
- Liquor license:
  - » Recommended as an additional source of revenue and experience enhancement.
  - » Fees range from 525 PLN annually for a standard beer license (below 4.5% or between 4.5%-18%, each) or 2,100 PLN annually for a liquor license (above 18%).
  - » Taxes can be charged if sales reach above a certain threshold through alcohol sales, with 1.4% of sales above 37,500 PLN being the threshold for lower-level licenses, and 2.7% of sales above 77,000 PLN the threshold for a liquor license.<sup>5</sup>

### • Noise restraints:

- » Liaise with local authorities as well as neighbors to meet noise regulations, such as ceasing noise after certain hours and soundproofing the venue as much as possible.
- » Noise complaints are the most common cause of venue closure.
- » Noise restrictions are overseen by the Silesian Marshal Office (Urząd Marszałkowski Województwa Śląskiego)
- Age restrictions:
  - » In order to maximise attendance and community involvement, as well as keep with Music HUB goals of youth engagement, the venue needs to be accessible by all ages and family-friendly.
- Occupancy capacity: in keeping with fire safety and health safety standards.

## LAYOUT AND DESIGN OF MUSIC VENUE

The music venue should have the following areas:

Lobby

https://www.sekap.pl/katalog.seam?id=561&actionMethod=katalog.xhtml% 3ApeupAgent.selectParent&cid=20665

- Cloakroom
- Stage
- Floor/seating area
- Green room
- Rehearsal room
- On-site offices
- Restrooms
- Bar
- Backstage loading dock for venue stock and performance equipment
- Parking (recommended to accommodate 35% of venue capacity)

The venue must have its own equipment and provide a top-of-the-line standard back-line, although should allow artists to bring their own equipment if unique and vital to the performance. Rehearsal space should also be provided for acts, bookable for a low, affordable fee or provided free of charge, and should be filled with basic equipment such as amps, leads, microphones, music stands, and a piano and drum set.

Disabled access is vital to the venue, as it certifies the building is accessible to all audience members. Disabled access includes parking, ramps, elevators (if applicable), and disabled restrooms and seating areas.

### **MARKETING**

- Should stem from and be agreed upon with the Music HUB.
- Includes online, on-site (such as the venue marquee and posters) and around town (working with the music tourism office).
- Event campaigns should commence no more than one month in advance, and no less than two weeks in advance. General venue campaigns should last no longer than six months before a new campaign is launched.

# ONLINE

- User-friendly, updated, and streamlined between platforms.
- Booking systems should work with universal platforms such as Paypal,
- or a custom-designed, but simple interface
- Should provide e-receipts and confirmation emails, as well as keep purchaser's details on file to automatically send updates on event changes
- Event calendar for a one-stop list of performances for the public to browse and choose from, divided by month and filled at least a month-3 months in advance. Each event's profile should lead directly to the ticketing portal.
- Enquiries and contact page for public feedback and community engagement.

### FINANCES/ACCOUNTS/FUNDING

- Overseen by the accounts manager and Music HUB board.
- Annual budget projection and a bi-annual account audit, with a quarterly performance review in terms of income and attendance.
- Ticket fee standards, or the money received by the venue as a service fee, should be decided by Music HUB. There are several options:
  - » Small door price & percentage of sales
  - » Percentage of sales
  - » Larger door price

- Refund policy in the case of cancellations, both on behalf of the venue and the ticket holder. Elements of such a policy are refund deadlines (for example, full refund if a thirty-day notice is given, etc.) and process time (meaning the time between refund confirmation and refund provision).
- It is worth providing 'ticket insurance' to ticketholders at a small excess fee at the time of purchase.

### SYSTEMS OF OPERATION

- Communicate with nearby venues to coordinate programming so no two venues are marketing towards the same genre on any given night. This lessens competition and allows audiences to attend more events if desired.
- End-of-term performance venue for institutions such as the Academy of Music, thus cementing a relationship and promotion of the educational sector in the music industry.

### **WORK PLACEMENTS**

Collaboration with local universities to offer work placement/apprenticeships for its students, either in the administrative offices or among the production team.

It is at the discretion of the Music HUB to determine a payment plan for such, if any, and the duration of the placements, although three months is a minimum recommendation, with one year being the maximum period.

## 4.3 Actions of the Music HUB

### ORGANISATIONAL ACTIONS WITH THE MUSIC HUB

# Action 1 Develop a 'Welcome to the Music Business' guide for musicians

According to the respondents, the breadth of talent in Katowice is extensive, but the business skills of its musicians needs improvement. Not all musicians wish to undertake formal education. Therefore, the Music HUB should design, write and make available a 'Music Business Toolkit' for all musicians, outlining basic and important information all artists must be aware of to develop their careers. Such a guide would outline all funding programs and support, as well as provide a list of venues, studios, workshops, and performance opportunities available in the city for aspiring musicians. It would include the contact information of relative businesses for musicians to build their networks. Such a guide would further their understanding of opportunities available to them and build a strong foundation of self-education through the provision of a coherent summary of fundamental knowledge. This information should be made available online and be updated constantly. It is imperative that musicians are presented with an introductory industry guide relating to the local and connective infrastructure in the surrounding area.

# Action 2 Be the contact point for all inquiries regarding music (like brak in Bergen or Rockcity in Hamburg)

- Artist counseling during half a weekday fixed appointments
- Questions about the music industry
- Questions about funding
- Help facilitating rehearsal spaces
- Questions about events at the Music HUB and Katowice
- Questions about international festivals, contacts etc,
- Staff within the Music HUB that has a broader knowledge of the music business and local area

RESPONSIBILITY: TEMPORARY PROJECT MANAGER WITHIN THE MUSIC HUB

# Action 3 Develop a workshop series, featuring industry professionals, for training purposes, and establish 'Katowice Music Business Mixers' and 'Meetups'.

One of the most challenging issues to overcome in Katowice is the relationship between its music practitioners. As a result, the Music HUB should establish monthly meetups to discuss local affairs, network and built trust. The meetings should be free, open to the public and relaxed, featuring a talk from a local, national or international industry leader. It is imperative that the Head of Music takes part in these meetings and introduces businesspeople to each other, to best maximise networking.

In addition to bringing in national and international buyers to Katowice's music festivals, this workshop series on a number of integral music industry topics will continue to develop trust and network sharing.

# Action 4 Develop a "Katowice Music Mentorship Network' of experts that donate 1-2 hours a month to work with local musicians.

An obstacle that needs to be overcome in order to develop a prosperous, locally-focused and supportive music sector is ensuring that trust is backed up with partners working together. There has been success in markets in Canada and the United States where programs are developed to set up mentorship structures, either in person or online, between experienced industry representatives and developing musicians and businesspeople. This could be done by enticing those already funded by the city, or offering small representation allowances to businesses to participate. A mentorship strategy, spearheaded by the Music Hub, will directly address a number of the challenges our survey respondents expressed.

# Action 5 Provide training and guides on how to utilise data and analytics in the music industry to all musicians.

Analytics and data are the future of music industry revenue and transparency. It is important that Katowice promotes fair trade and fair payment for artists. In doing so, educating music professionals on analytics and data technology through guides, short courses, guest speakers or features in other programming will help the next generation of music entrepreneurs. This could be done during a one-day workshop or digital summit at the Music HUB and be accessible online or in physical formats. Workshops could cover topics such as monetising streaming on platforms such as Spotify or YouTube, distribution through online/global stores such as iTunes and Amazon, and how to translate collected data on sales and consumption trends into an effective strategy.

**RESPONSIBILITY: EXTERNAL CONSULTANCIES** 

# Action 6 Employ local musicians to teach primary school students on a part-time basis at the Music Hub

One of the challenges voiced by a number of local musicians in the survey was the dearth of local opportunity to develop new relationships alongside earning capital to progress their careers. A pioneering program in the United States, Youth on Record, employs local musicians to teach music and music business to youth. This could be adapted for Katowice, where local musicians can be deployed, through a policy-led initiative, to teach the new generation of youth music. The musicians can earn extra money, while also contributing to the local community and the music ecosystem.

This could be done on a freelance basis with 2-3 hours per week per artists at the Music Hub.

### **FUNDING & FINANCING ACTIONS WITHIN THE MUSIC HUB**

# Action 7 Have a transparent standardised application process and funding scheme within the organisations in Katowice with a yearly rotating jury.

As mentioned above, Katowice needs transparent funding schemes and institutions. The City Council can provide funds to projects at the Music Hub and The City of Gardens Cultural Institution will expand their funding schemes. Both need standardised approval and denial process, with a strict timeline, for all applications for funding, and to ensure procedures are adhered to. Both need neutral juries that decide about the applications. Those jurors have to change every year and should consist of different experts in genres. A sub-group of the Unesco advisory board could for example be the jury .

There are several different ways of funding. Research within other countries has proven that matching funds and micro-financing programs are the best ways to support the industry by keeping them engaged.

### **ARTIST FUNDING:**

- Tour and showcase support national and international 50% funding and max of 2000 zł per person in the band
- Album support 40% of the total costs can be funded / 60 % should come from the artist / label max of 60,000 zł funding
- Marketing support national and international marketing campaigns, matching up to 50% of expenses incurred

## **FESTIVALS:**

- Support festivals of all genres of music especially those that include and support Katowice based up and coming artists and music professionals.
- The funded projects should have a positive impact on the music business and the music scene overall.

## **INFRASTRUCTURE:**

• Call for concepts - funding for projects that support the music scene in Katowice - 5000-10000 zł per project

# Action 8 Introduce a label micro-financing program (2000-4000 zł) for artists to set up labels or release their own material.

Business development in Katowice relies not only on having the space and time to create, but also on the financing. Working with private financiers (banks, for example), Katowice could establish a micro financing structure for musicians and music businesses, up to 4000 zł, to start a new business.

# Action 9 Commission research to look at establishing a grassrootsvenues fund.

Similarly to the new entrepreneurs / microfinance support, another structure could be implemented to encourage venues to apply for new equipment and technologies to enhance their sound, or organise courses to train sound people and light technicians. Funding could be collected from government allocation, stakeholders investment, or public funding such as donations.

**RESPONSIBILITY: COORDINATOR OF THE MUSIC HUB** 

# Action 10 Publish all successful applicants and how much they have received in public funding on a website (like FACTOR).

Ensure that public information is communicated to applicants before it is made public, to build consensus. This information will act as a series of case studies for potential future applicants as well as research institutions, with transparency acting as the greatest asset for accuracy.

# Action 11 For those that receive funding, it is mandatory they attend networking events.

One manner in which capacity-building can be developed to encourage and foster trust and support within the community is to bring together recipients of support to network, to learn from each other and develop relationships. In the United Kingdom, for example, certain funds require recipients to attend networking and reporting sessions as part of their allocations, and this often fosters a more sustainable, closer relationship with the funder, the structures in place and the city as a whole. It is recommended that those who receive funding from Katowice's public support structures – in whatever capacity – participate in industry meetups and networking sessions.

## **MARKETING & COMMUNICATION ACTIONS WITHIN THE MUSIC HUB**

# Action 12 Develop a high quality website that communicates the stake-holders in Katowice and their value to international buyers.

In addition to the formal UNESCO bid city created by City of Gardens / The City of Gardens Cultural Institution, a 'one stop shop' for Katowice's music and music business community would assist buyers in finding out how to approach and do business with Katowice in a simple, defined fashion. This could be completed in conjunction with the 'music map' and provide a list of contacts, venues, a mixtape or SoundCloud playlist and other marketing activities. It is vital that this website is not only user-friendly, but search engine optimized in order for potential buyers to navigate around it both prior to and following communication with the Katowice music business community.

The website should also contain a contact and feedback page, which would encourage both public and private sectors to engage with initiatives building the music district by providing comments. The site will offer a summary of initiatives, perhaps as a copy of the Manifesto, opportunities for updates via newsletter, and, of course, contact information, either through a direct portal or by a listed directory of contacts. This will be a simple, streamlined platform for interested parties to receive basic, yet vital, information in forming strategic suggestions and opinions useful to The City of Gardens Cultural Institution. It is suggested any correspondence received will in turn be sent a signal of confirmation, be it by e-mail or other means, to reiterate engagement in consideration of remarks received.

# Action 13 Develop a 'map' of Katowice's music contacts for foreign businesses interested in trading with local companies

In order to facilitate the most active and engaged music business offer, it is said that one must create the 'path of least resistance' to the buyer. Have a database of Katowice music contacts available for any foreign businesses interested in trading in Katowice, preferably in the form of a literal digital map with dots representing cultural institutions and links to their work. This could be run in accordance with the music and cultural information hub proposed in Action 2 for domestic or visiting enquiries, and a user-friendly online portal for international prospects. A streamlined registration process needs to be developed to facilitate new business applications for inclusion in the database.

# Action 14 Creation of community noticeboard

Available both online and offline, this would be a port of call for all industry stakeholders to find information on events and opportunities such as networking and upcoming programs. This encourages activity within the industry by highlighting key proceedings from a trusted, collective source, and publishing to the greater community allows a broader audience and engagement rate. Updates can be posted via newsletters or social media, although all should lead back to an accumulation of sources via the website and updated physical listings at the Music HUB offices.

# Action 15 Ensure that all communication is done through one defined, structured voice.

Katowice must communicate through a singular voice to the outside world in the realm of music and music industry development. It is recommended that City Council, The City of Gardens Cultural Institution and Music Hub speak in one voice, the conversation can be led by The City of Gardens Cultural Institution and the PR & Communications team.

RESPONSIBILITY: IKKMO PR & COMMUNICATION TEAM

### POLICY ACTIONS WITHIN THE MUSIC HUB

# Action 16 Encourage all local musicians to join the musicians union, artists associations and encourage more local copyright transparency, to influence national transparency

Związek Zawodowy Polskich Artystów Muzyków Orkiestrowych, ZZ PAMO, is the Polish musicians union and is a member union of the International Federation of Musicians. STOART is the Artists Performers Association and STOMUR the Popular Music Performers Association. Having an informational and supportive hub run by musicians and associations that support artists is vital in nurturing growth from an empathetic perspective. Musicians unions offer legal advice, networking opportunities and career advice and act as a platform to politically lobby for musicians' best interests at local and national levels. High participation figures ensure that the majority interest is represented by the union and lend a voice to musicians in any community.

In the interviews, it was discovered that many local musicians are not registered with the national collection society, ZAIKS. If local musicians are not registered with this administration, the usage of their works in many forms is not remunerated, leaving them unable to capitalise on certain income streams. It is important that Katowice encourage all their tax-paying musicians to register their works and make the necessary relationships to ensure that this is respected on all sides of the transaction. Without proper registration, building trust in governance and institutions will be hampered.

**RESPONSIBILITY: MUSIC HUB COORDINATOR** 

# Action 17 Develop an Audience Development plan for the Music Hub and other venues.

There are a number of incentive programs in existence around the world that encourage a bigger audience (students or local businesspeople) to go see local live music. An initiative or platform, aimed at Katowice's extensive student population, to encourage them to go see local live music would raise awareness of local artists, provide a stronger platform for development and increase the development of the ecosystem. A broader audience development plan with Discounts, a specific evening every month that showcases artists at a reduced rate, targeted newsletters and marketing or concerts of student-run nights needs to be developed. Still, it is important that these shows are not completely for free, as the audience has to be educated to pay for concerts.

# Action 18 Support exchange, artist-in-residence programs and mentorship between Katowice's music hub and music scene and international partners.

In addition to fostering business mentorship programs, it is advisable to use the breadth and depth of Katowice's music making community and the Music Hub to continue to foster relationships with each other through artist-in-residence exchanges or studio exchanges. The Music Hub will have rooms available for artists to stay for a period of time and to use the Music Hab facilities. The artists don't have to be only musicians, this program can be open to visual artists, designers etc. Such collaborations could be coordinated in conjunction with local festivals (Tauron, ARS, NOSPR activity), foundations etc. and be utilised to satisfy the necessary requirements on the cultural side of the UNESCO 'stamp'.

The artist-in-residence program will be free of charge for the artists, they are supposed to leave a piece of work in Katowice in exchange for hospitality.

Utilities will be higher if artists live in the building constantly.

RESPONSIBILITY: MUSIC HUB TO TAKE CARE OF THE APPLICATION PROCESS AND ARTISTS AND THEIR NEEDS, EXTERNAL CONSULTANCY FOR DEVELOPING THE INTERNATIONAL RELATIONSHIPS IN COOPERA-

## INTERNATIONAL ACTIONS WITHIN THE MUSIC HUB

TION WITH IKKMO.

Katowice is a world renowned creative city. It is small enough to project a unique identity, yet large enough to attract import businesses, including tours, festival visitors and musical collaborators. As the 4th largest city in Poland, and a major stop for touring artists, Katowice can do more to entice foreign artists to perform in the city, while encouraging more collaboration with local artists. It also must play its part in supporting the Polish music industry as it continues to develop and export content. Katowice can be a national thought leader in internationalising its music community.

# Action 19 Coordinate music trade missions for international buyers and journalists at Katowice's festivals.

Katowice has some of the most exciting and interesting music festivals in the world. These festivals are its calling card and its promotional vehicle. It would be best to use them as tools to foster and develop stronger international relationships with buyers and the national / international music industry by providing them with first-hand experience of the Katowice music scene. Further, this could lead to trade mission opportunities for Katowice representatives to establish ties in international markets and study successful strategies to implement domestically.

RESPONSIBILITY: EXTERNAL CONSULTANCY

# Action 20 Coordinate, with local, private partners, targeted showcases at festivals for national and international buyers in local venues to showcase local talent.

Venues feel left out of large-scale music festivals, except NOSPR and SPODEK. One opportunity to develop and sustain Katowice's grassroots music venue infrastructure is to develop 'off-venue' or secondary programming, in conjunction with its festival promoters, at its major festivals. This can involve utilising classical and jazz performances in secondary venues and provide more infrastructural support to developing and fostering the relationship between emerging local artists (and businesses) and the major music festivals in the city.

**RESPONSIBILITY: MUSIC HUB TO ORGANISE / EXTERNAL CONSULTANCY** 

The work begins after the showcase, it is said. It is imperative that in all networking and showcasing opportunities, the invited buyers personally meet and interact with the showcasing artists, as this fosters commonality and most often, buyers email back artists whom they have personally met. This could be done by providing a dedicated networking space at the festivals as well as employing a liaison dedicated to ensuring all opportunities are utilized.

**RESPONSIBILITY**: MUSIC HUB PROJECT MANAGEMENT TO ORGANISE

# Action 21 Establish a network of international professionals to select showcasing artists; Create a 'Friends of Katowice' program.

This is an Action that has been adopted in "Reverb", Adelaide, Australia's music strategy. There, a small group of international 'friends of the city' was coordinated to act as mentors, select showcasing artists, attend conferences and provide industry data. This could comprise of national and international partners and be split across genre and sector. Such partners can negotiate deals and discounts with suppliers and be a first 'port of call' for international activity.

**RESPONSIBILITY: MUSIC HUB COORDINATION** 

# Action 22 Join the Music Cities Network

Music Cities Network is a public/private network dedicated to improving communication, sharing research and intelligence, exploring policy and advocacy, and networking for policy makers and city leaders. The network is aimed at making cities wealthier, healthier and more international through music.

It is a membership-based network, focused on four objectives

- 1. Improving cities through music policies
- 2. Building greater networks and creating an actionable agenda for change
- 3. Providing and sharing a one-stop repository of information and researching surrounding global music cities activities
- 4. Curating a music player exchange / collaboration (business, artists, cultural institutions and education)

The network begins as an information- and research-sharing repository, protocol series, and message board and evolves into a trade association that develops the concept of 'music cities' externally (to politicians, economic development agencies, chambers of commerce) for destination marketing and business improvement.

# 4.3 Policy actions

These Actions are relating directly to the implementation or reformation of policy. These will increase music- and musician-friendly policies in Katowice, creating more cohesion, cooperation and music industry development. These Actions are to be led by The City of Gardens Cultural Institution, but include a wide range of stakeholders, from national organisations to local musicians, festivals, policymakers and other businesses. They are presented in a non-linear fashion; There is no particular order for these to be implemented, but each is as important and integral to music industry development as the next.

Without a trusting, supportive administration, a clear chain of command, a defined communication process and a definitive transparent value chain, other policy initiatives will not be supported by those that matter most - the artists.

### **GOVERNANCE**

### Action 23 Publish a Manifesto of Initiatives

This will be a short, one-page manifesto, published by the The City of Gardens Cultural Institution, summarizing the initiatives undertaken in this venture (i.e.: objectives outlined in the Actions). It will list the paths of completion, to encourage full transparency between the private and public sectors. The Manifesto will be updated as initiatives progress and are subsequently completed to hold the private sector accountable for resolution according to the projected timeline.

RESPONSIBILITY: IKKMO

# Action 24 Construct and mandate a 'Katowice Music Industry's Best Practices Charter'.

The advisory board, its activities and initiatives should be governed by an independent, agreed-upon document called a 'charter' or 'code of best practices'. Similar to other codes and regulations at City Hall, it must be endorsed by the Mayor and his administration and be ratified in council chambers as a working document that guides and governs how Katowice supports its music business ecosystem. It must outline a dedication to transparency, network and capacity building, the responsibilities of the advisory board, the process of its members joining and leaving and its reporting procedure to city hall, the regional government and the Polish national government. This would be a first in Poland and showcase, to other cities, the valuable and integral role the music ecosystem – in all its facets – has in encouraging city development. Standardising and formalising this pledge is integral to its success and adoption.

**RESPONSIBILITY: CITY COUNCIL / PART OF THE 5 YEAR STRATEGY PLAN** 

# Action 25 Set up a more researched-focused institute within The City of Gardens Cultural Institution

This department would handle international- and sister-cities-based work. The key activities involved would include compiling data and sharing the best practices charter (see Action 26), while ensuring free availability of such information to any funded organisation. The research will be ongoing and at regular intervals, and will include developing export and international relations pertaining to the music industry, as well as conduct regular censuses on local and industry trends data, keeping information on file for collaborative institutions and for internal use in progressing the industry accordingly. This Action would link with the Action 22 "join the Music Cities Network", as there will be a lot of research focused projects within the network.

**RESPONSIBILITY: IKKMO** 

# Action 26 Create a cultural institutions charter of best practices

Katowice offers a number of different public sector organisations comprising of many different music genres and auspices. It is best that not only are all genres treated transparently, but all music-related support be placed in line with other cultural and creative industries support in the city. The most assertive manner to approach this is by creating a charter of best practices, outlining the objectives public institutions pursue across the cultural industries. The charter should communicate:

- All genres and disciplines are treated equally in Katowice.
- Cultural and Economic arguments for supporting mechanisms are to be treated differently.
- Katowice should adhere to a robust diversity and disability policy in supporting as wide range of views as possible in the city.

• All support provisions be communicated in simple Polish with deadlines, reporting practices and procedures.

**RESPONSIBILITY: CITY COUNCIL** 

# Action 27 Have monthly meetings with executives to share best practices

Meetings will see up-to-date charters as well as present the opportunity to outline core responsibilities and share with each, to minimise competition and duplication. This facilitates efficiency in task completion, and institutions will be aware of the validity of their roles as being equal to that of City of Gardens in the progression of Katowice as a Music City. Ensuring each party is aware of role allocation also invites collaborations between parties, which will enhance task completion rather than the hinderance of competition. It is recommended that an attendance policy is set in place for participating institutions to ensure understanding of best practices in accordance with given responsibilities, and that the procedures are documented by a 'secretary' for future use.

RESPONSIBILITY: IKKMO

# Action 28 Investigate tax credit infrastructure for the music business.

There are a number of tax credit and tax incentivisation systems that cities can develop music infrastructure, including tax and rate relief for new venues for soundproofing and new equipment or micro-grants to musicians to purchase new equipment, see also Action 9. An audit of tax credit infrastructure nationally and internationally can help identify further measures that can be used, from a regulatory perspective, to support musicians and music business in Katowice.

**RESPONSIBILITY: IKKMO WITH CITY COUNCIL** 

# Action 29 Arrange a yearly 'music town hall meeting', first in 2016

To develop an engaged music ecosystem that supports local musicians and industry, it is important that the breadth of Katowice's music listening community be a part of the debate and discussion. In Toronto, for example, a 'Town Hall' meeting was organised for constituents, to discuss how music impacts living in the city. Such a meeting with the support of local politicians and administrators would help further understand challenges and mine the community for solutions. Parties represented would include aforementioned Head of Music, local musicians, and local institutions from The City of Gardens to academic institutions to set in place the year's expectations for common understanding. It is best that this be developed after other implementations, to ensure the music community supports the mission and promotes it to the local community.

**RESPONSIBILITY: MUSIC HUB** 

# Action 30 Establish a Katowice music industry advisory council

It is important that those impacted by the decisions are involved in making them, and that there is a singular chain of command between music practitioners and city council. In addition, the council can be kept abreast of city council amendments and ordinances and develop, over time, a trusting and beneficial relationship that benefits all stakeholders. It is imperative that the organisation and maintenance of the council is completed transparently, with appropriate checks and balances, and consists of:

- A. males and females
- B. all sectors (venues, festivals, managers, labels, musicians)
- C. all genres.

- D. support providers (staging, lighting, studios)
- E. politicians
- F. arts support organisations

The advisory board can be split into working groups, each responsible for understanding, unpacking and supporting a sector of Katowice's music economy. Working groups that are best to begin with include:

- A. Licensing and Planning
- B. Use of Public Space
- C. Festivals and Venues Live Music
- D. Education and Talent Development
- E. Networking
- F. International and National Relations

RESPONSIBILITY: IKKMO

## Action 31 Create a Music District

Katowice is a city that has a centrally-located set of entertainment zones. The main street leading up to the Mariacki church is one; NOSPR is another. To support business development and standardise regulation, two 'music districts' can be created – a summer one and a winter one, to support and standardise music and music making projects. This includes developing more sustainable relationships with bars, restaurants, hotels and hostels, providing tax credit, rate relief of support for sound proofing and security development, standardising licensing and planning practices and developing a 'deed of easement' structure for new residences that respect the existing businesses in the zone.<sup>6</sup> RESPONSIBILITY: IKKMO WITH CITY COUNCIL

# Action 32 Analytics to measure festivals.

In order to best manage Katowice's extensive festivals offer, it is recommended to analyse and measure the festivals on their economic and social impact on the city, the number of visitors and where they are from, the investments the festivals take, the fees they spent, how many local acts they present etc.

**RESPONSIBILITY**: EXTERNAL CONSULTANCY

## Action 33 Reform Free Music Festivals, starting from 2017

Katowice, like the rest of Poland, operates large-scale, city-funded free music festivals. While these develop community engagement, too many can be detrimental to the development of Katowice's music infrastructure, as our respondents have noted. It is best that an audit of these festivals be conducted and a plan to charge an entry fee, even if that entry fee is minimal, donated to charity or reinvested back into the community. This is already being practiced by several area festival charging very little for tickets. It is not recommended that all free festivals be reformed, but that an audit of their impact on paid festivals be investigated, to explore the full scope of Katowice's festival offer. Katowice is one of Poland's (and Europe's) premier festival cities - and it needs to micro-manage that responsibility

**RESPONSIBILITY: IKKMO** 

# Action 34 Develop a Festival Transport Strategy

In order to develop more engagement with local musicians and consumers, City of Gardens / The City of Gardens Cultural Institution is encouraged to work with the Silesian

http://uk.practicallaw.com/1-507-1303

transport authorities (train, bus and airport) to promote its festivals and ease the usage of public transport to and from the festival. This includes a car pooling strategy, extending bus hours during festival times and promoting events through activities and initiatives at Katowice and Krakow airports. In Seattle, for example, musicians are hired to perform on baggage carousels to welcome tourists and visitors, and pamphlets are handed out outlining all city festivals – music and otherwise. This can encourage a more welcoming feel for the city to visitors – music and otherwise.

RESPONSIBILITY: MUSIC HUB COORDINATOR / IKKMO/ CITY COUNCIL

## **REGULATIONS**

# Action 35 Conduct a review of licensing and planning structures that apply to the music industry in Katowice.

The backbone of a music ecosystem is a healthy and supportive planning and licensing infrastructure that benefits and encourages music and music business activity. It is imperative that Katowice audit its planning structures, including licensing restrictions, noise attenuation, affordable housing commitments, planning requirements, consents, public space usage and permitting.

**RESPONSIBILITY: CITY COUNCIL** 

# Action 36 Conduct a review of festival permitting infrastructure to look at streamlining processes and costs for applicants.

Katowice must develop a turnkey festival strategy so each festival is equally and transparently supportive by city council and importantly, time and resources are saved in easing and standardising permitting procedures, from provision of electricity and water, security, health and safety, tenting and personnel issues. One path of streamlining would be to digitize as many processes as possible, to include permitting, ticketing, and all information concerning events.

**RESPONSIBILITY: EXTERNAL CONSULTANCIES WITH CITY COUNCIL** 

# Action 37 Adopt the 'Deed of Easement' Policy in all local tenancy agreements.

The 'Deed of Easement' policy is a measure to alleviate the concerns of local residents in terms of noise with venues and festivals. It approaches the problem when the resident takes tenancy of an apartment next to a venue and communicates, in advance of such a tenancy, that a venue is present and as long as license conditions and noise levels are not breached, the resident cannot complain. This is only related to new residents beside already existing venues; if a venue is built next to apartments or other residences, it is expected the venue adopts the 'Deed of Easement'. If residents are aware of venues and festivals, and respectful of them (and festivals respect noise attenuation measures), this saves resources and time in terms of noise complaints and fosters stronger relationships, especially in busier, noisier parts of the city.

**RESPONSIBILITY: CITY COUNCIL** 

# Action 38 Conduct a noise attenuation audit in public performance locations to ensure residents are not affected in the main square and NOSPR.

It is imperative that Katowice's public squares (area around NOSPR and City Hall) are outfitted for live music, from busking to large scale concerts. Many technologies exist that ensure live music can prosper while local residences are protected from noise pollution. Katowice can become a world leader in noise attenuation and health and safety around live music.

RESPONSIBILITY: IKKMO

# Action 39 Adopt the 'Agent of Change' Principle.

For all new developers in Katowice, it is imperative that existing licenses, as long as they remain within the rules, are protected so new residents do not complain about pre-existing noise. This is what the 'agent of change' policy legislates. Katowice should ensure this is enshrined in city legislature, to protect venues, pubs, clubs and any business that emits noise within its license provisions.

**RESPONSIBILITY: CITY COUNCIL** 

# Action 40 All city employees respond to emails within 5 days.

It is really important that city employees respond to emails within a defined timeframe, as many emails get missed and go unanswered. Response reliability encourages communication from prospective buyers and international representatives who know their enquiries will be made a priority. Although Katowice operates on a 30-day response scheme, this will only be acceptable when communicating with local institutions. The music industry is fast-paced, and when dealing with international clients in export and tourism development, email customs of immediacy will need to be adhered to.

RESPONSIBILITY: ALL

### **VENUES**

Different scale and capacity venues are key for a vibrant music scene in a city. Katowice lacks grassroots venues for emerging artists, where they can perform, meet and practice.

# Action 41 Produce a Katowice venues map

Survey the venues and produce a 'Katowice' venues map, outlining capacities, venue structure and outcomes from the venues. The results of which can be used to optimize venues for musicians, promoters, and attendees.

Furthermore a map is important to maintain venues at their current location and to strengthen their position when investors or building projects come into place. (See also Action 39)

**RESPONSIBILITY: MUSIC HUB / EXTERNAL CONSULTANCY** 

# Action 42 Conduct a Katowice music venue assessment.

Assess the technical requirements of Katowice's venues in an effort to identify minor, cost-effective enhancements that can create better conditions for artists. This is very important to analyse the opportunities that emerging artists have to perform locally and often, and the role they have in developing a stronger and more united local music community. Understanding, in great detail, Katowice's venue infrastructure is integral to establishing a strong live music market.

**RESPONSIBILITY**: EXTERNAL CONSULTANCIES WITH LOCAL PARTNERS.

# Action 43 Establish meetups and networking activities between venue operators, to encourage collaboration, rather than competition.

Create a Katowice music venue map, outlining both a 'cultural trail' of sites while understanding how artists graduate through the system; ensure it is a 'step ladder' system. In addition, ensure that venue operators communicate with each other positively on shared issues, such as city policy and treatment of the night time economy.

RESPONSIBILITY: MUSIC HUB

# 4.4 Stakeholder engagement

## **EDUCATION**

The building blocks of a healthy, sustainable and vibrant music ecology for any city is in its education, training and knowledge ecosystem surrounding its music practitioners. Katowice has a robust formal music education infrastructure, covering instrumental and theory training. However, it lacks structure in what would be considered informal music education; understanding the modern, complex music industry as a business. It is important to note that although this may be classed as 'informal,' this does not mean it shouldn't be taught by accredited institutions, and it is imperative that Katowice's higher education academies and institutions, along with its cultural institutions, collaborate further to address this in order to develop Poland's music business people of the future. The city itself is an educational and research case study – its multitude of students can be its researchers.

# Action 44 Ensure there is a course that focuses on music business and copyright.

Katowice has one of the most extensive and impressive music education infrastructures in Poland. It is home to a number of classical and jazz music institutions, including IPIUM and the Karol Szymanowski Academy of Music. There are four compulsory subjects for students at the Academy of Music: Social Communication and Event Organisation, Promotion and Marketing of Cultural Goods, Music in the Cultural Context and Intellectual Property Protection. However, there is no globally accredited, professional music business university course in Poland. Therefore, it would be recommended to conduct an audit of the business structures of the existing courses, to ensure that students are being introduced to the correct topics, along with their performance related studies. This audit, through surveying and speaking to students, will assist in outlining deficiencies in the academic programs, if such exist, to understand what is lacking in music business education in Katowice, and Poland as a whole.

Katowice has an opportunity to become a national leader in the field and should use the strengths of its local higher academic structure to develop an international, bi-lingual music business program that can compete globally. This can draw an international student body to build upon existing networks, as well as ensure sustainability by ensuring the next generation has accredited, reliable educational resources.

**RESPONSIBILITY: IKKMO WITH UNIVERSITIES** 

# Action 45 Partner with international institutions.

In addition, exploring a partnership with an accredited music industry college such as BIMM, Berklee College of Music or SAE to bring them to Katowice, in partnership with local authorities, could create a lucrative opportunity to develop the music business ecosystem. This expands industry connections by giving Katowice access to partner university networks, and familiarizes foreign industries with that of Katowice through exchange programs.

**RESPONSIBILITY**: EXTERNAL CONSULTANCIES (UNIVERSITIES)

# Action 46 Ensure music education in school is mandatory and all schools are equipped with the best music equipment possible.

From nursery through to high school graduation, The City of Gardens Cultural Institution and Katowice City Council must ensure that music education is a mandatory requirement

of local curriculum and that students are supported with the best musical equipment. According to the American Arts Education partnership, music education enhances motor skills, supports brain development, fosters working memory and cultivates critical thinking skills. <sup>7</sup> Education should start from the earliest age possible, as this is how Katowice will sustain and foster its music development.

Similar to the program "Jeki" (Every child one instrument in Germany) primary schools in Katowice can apply to take part in the program. In the first two years the children can try and choose different instruments, in the third and fourth year they pick an instrument and learn to play it. The City of Katowice provides the teachers and instruments for the schools.

**RESPONSIBILITY: CITY COUNCIL** 

### **TOURISM AND BRANDING**

# Action 47 Educate the tourism office about music and cultural information happening in the City.

Katowice needs to have a multi-lingual tourism office offering to explain how it is not only a City of Gardens, but also a City of Festivals and Music. The tourism office needs to be aware of the local concerts and festivals, and trained to provide advice to visitors to the music offering in the city.

BUDGET: IMPLEMENT IN THE TRAINING OF THE TOURISM OFFICE

**RESPONSIBILITY: MUSIC HUB** 

# Action 48 Translation of all city materials.

In all cultural infrastructure (museums, signage, hotels, music festival programming, city communication), Katowice must ensure all documents are professionally translated into English. This Action equally applies to websites, who should have translations readily available, conducted by the businesses themselves to ensure accuracy, rather than relying on the browser's built-in translation app.

**RESPONSIBILITY: IKKMO** 

# Action 49 Develop optimized and user-friendly online presence

Initial research into both the bid and market research proved Katowice a difficult music industry to find online, spare major venues. Companies need to ensure they are search-engine-optimised and maintain user-friendly websites to promote both domestic networking and encourage export opportunities for international parties seeking information. It is worth getting in contact with Made Media, who operate the websites for institutions such as the Roundhouse, Royal Albert Hall, Museum of Science, and National Theatre or doing a workshop for website optimization at Music HUB.

RESPONSIBILITY: MUSIC HUB

## Action 50 Develop more 'Sister City' Relationships

Katowice is an amazing example of putting culture at the heart of a city's strategy, and it must use that strategy to continue to forge stronger relationships with other like-minded cities around the world. It is suggested that in addition to UNESCO, it explore membership in the sister cities council, global cultural districts network, world cities culture forum and others. Katowice's current sister cities are Cologne, Germany; Miskolc, Hungary; and Ostrava in the Czech Republic. These relationships foster trade and tourism between cultures, which will aid in export strategies and help Katowice develop a global presence as a City of Music.

**RESPONSIBILITY:** CITY COUNCIL / EXTERNAL CONSULTANCY

# 5. Actions Logistics

## 5.1 Timeline of Actions

### **ONGOING**

- Action 2 Be the contact point for all inquiries regarding music (like brak in Bergen or Rockcity in Hamburg)
- Action 15 Ensure that all communication is done through one defined, structured voice.
- Action 16 Encourage all local musicians to join the musicians union, artists associations and encourage more local copyright transparency, to influence national transparency
- Action 10 Publish all successful applicants and how much they have received in public funding on a website (like FACTOR).
- Action 11 For those that receive funding, it is mandatory they attend networking events.
- Action 29 Arrange a yearly 'music town hall meeting', starting in 2016
- Action 33 Reform Free Music Festivals starting 2017
- Action 40 All city employees respond to emails within 5 days.
- Action 43 Establish meetups and networking activities between venue operators, to encourage collaboration, rather than competition
- Action 45 Partner with international institutions.
- Action 50 Develop more 'Sister City' Relationships

## **JUNE 2016**

- Presenting report
- Application process for Music Hub staff / assigning new people for the open position
- Action 30 Establish a Katowice music industry advisory council

# **JUL-SEP 2016**

- Action 1 Develop a 'Welcome to the Music Business' guide for musicians
- Action 7 Have a transparent standardised application process and funding scheme within the organisations in Katowice with a yearly rotating jury.
- Action 23 Publish a Manifesto of Initiatives
- Action 35 Conduct a review of licensing and planning structures that apply to the music industry in Katowice.
- Action 47 Educate the tourism office about music and cultural information happening in the City.

## **OCT - DEC 2016**

- Opening Reception of the Music Hub in December
- Action 4 Develop a "Katowice Music Mentorship Network' of experts that donate 1–2 hours a month to work with local musicians.

- Action 9 Commission research to look at establishing a grassroots venues fund.
- Action 12 Develop a high quality website that communicates the stakeholders in Katowice and their value to international buyers.
- Action 14 Creation of community noticeboard
- Action 27 Have monthly meetings with executives to share best practices
- Action 37 Adopt the 'Deed of Easement' Policy in all local tenancy agreements.
- Action 41 Produce a Katowice venues map
- Action 48 Translation of all city materials.
- Action 49 Develop optimized and user–friendly online presence

## **JAN-MAR 2017**

- Official Opening of the Music Hub
- Action 3 Develop a workshop series, featuring industry professionals, for training purposes, and establish 'Katowice Music Business Mixers' and 'Meetups'.
- Action 6 Employ local musicians to teach primary school students on a parttime basis at the Music Hub
- Action 18 Support exchange, artist-in-residence programs and mentorship between Katowice's music hub and music scene and international partners.
- Action 36 Conduct a review of festival permitting infrastructure to look at streamlining processes and costs for applicants.
- Action 39 Adopt the 'Agent of Change' Principle.
- Action 42 Conduct a Katowice music venue assessment.

## APR-JUN 2017

- Action 5 Provide training and guides on how to utilise data and analytics in the music industry to all musicians.
- Action 8 Introduce a label micro-financing program (2000–4000 zł) for artists to set up labels or release their own material.
- Action 19 Coordinate music trade missions for international buyers and journalists to Katowice's festivals.
- Action 38 Conduct a noise attenuation audit in public performance locations to ensure residents are not affected in the main square and NOSPR.

## **JUL-SEP 2017**

- Action 13 Develop a 'map' of Katowice's music contacts for foreign businesses interested in trading with local companies
- Action 17 Develop an Audience Development plan for the Music Hub and other venues.
- Action 22 Join the Music Cities Network
- Action 32 Analytics to measure festivals.

### **OCT-DEC 2017**

- Action 25 Set up a more researched-focused institute within The City of Gardens Cultural Institution
- Action 21 Establish a network of international professionals to select show-casing artists; Create a 'Friends of Katowice' program.
- Action 34 Develop a Festival Transport Strategy

### **JAN-MAR 2018**

- Action 31 Create a Music District
- Action 44 Ensure there is a course Katowice that focuses on music business and copyright.
- Action 46 Ensure music education in school is mandatory and all schools are equipped with the best music equipment possible.

## 5.2 Benefit of Actions

The benefits of fulfilling and enacting the recommendations in this strategy are both qualitative and quantitative. It is integral that all interventions are mapped as they occur to explore the economic impact of these actions. It is estimated, in line with similar studies produced in the UK and Australia, that for every 1 zl invested in music in Katowice, 3-4 zl will be generated in economic impact. According to UK Music,  $^8$  music is outperforming the rest of the economy by 5% and for every £1 invested in music, £4 is generated in impact. In Australia, according to the live music census, for every \$1 AUD invested in music, \$3 is generated back.  $^9$  This is through a number of variables and avenues, including:

Greater skills development for Katowice's musicians across dissemination / distribution networks will improve their ability to market and sell their content without increasing cost.

Efficiency savings within the Katowice City of Gardens and cultural infrastructure make-up; as the two organisations merge, a more streamlined approach to music intervention, based in one building, will reduce overheads across business verticals, from staffing to administrative costs.

Further templating of economic impact assessments and evaluation mechanisms will further develop a catalogue of data that will develop better interventions, including the support delivered to festivals, for example.

By charging for free festivals - even 'pay what you can' - further revenue will be generated by the City out of its public festivals.

Increasing or introducing a music business program in Katowice will not only be a first in Poland and encourage inbound residence from foreign students (not local), but also further professionalise the music community in Katowice and provide / develop greater links with international networks.

Not only will Katowice become the City of Music in Poland, it will also become the music business incubator of Poland; a forward thinking, well structured city that supports its music makers and businesses with supportive policies and administrations. The most intangible but arguably integral benefit of this will be the development of trust within the city, and the increase in collaboration across sectors, genres, disciplines and authorities. It is integral that all those who live and work in Katowice work together without prejudice, and a neutral, bi-lateral approach to music making and music business, over time, will encourage and develop such a change. This was one of the largest challenges faced in conducting the study and research; a lack of trust and a frame of suspicion between stakeholders. It is imperative that this be a formative benefit. By taking these recommendations to heart and working on and with them slowly and meticulously, the Music HUB and implementing these recommendations will not only impact the economic situation of Katowice's musicians and music businesses, it will develop trust and increase capacity, creating opportunities that no one knows exists yet.

<sup>8</sup> www.ukmusic.org/assets/general/Measuring\_Music\_2015.pdf

<sup>9</sup> http://livemusicoffice.com.au/research/#/research\_category/the-value-of-live-musicmaking-in-australia-2014/

# 6. Conclusions

Katowice is currently experiencing upwards economic growth and thus provides a promising and capable platform to transfer this into the music industry. With world-renowned infrastructure already in place, and validated by its recent UNESCO City of Music designation, Katowice is swiftly becoming a dominant music market. By implementing the Actions listed above, in consultation with Sound Diplomacy, The City of Gardens Cultural Institution and various public and private institutions, the city can ensure its developing market positively impacts sustainability.

The biggest sectors offering room for growth are Katowice's professional support and its export strategy. Grassroots musicians, of which there are many in the city, will benefit greatly by developing more trained music professionals in Katowice, from managers to producers and collection societies, which will streamline export strategies into marketable products, ready for global adaptability. This, in turn, will increase tourism as the world becomes more familiar with Katowice's musical offerings.

Alongside tourism, the establishment of a sustainable, reliable and transparent music industry will generate private music business, marking Katowice as a prime city for global musicians and music companies to conduct their trades.

# 7. Appendices

## 7.1. Interviews:

# IREK DUDEK RAWA BLUES FESTIVAL

"In the 60s, there was a club and we did blues. It was still our roots; in Katowice, each band starts from blues. In 1981, I did the first edition of Rawa. For 12 years, it was all Polish. Then I left and went to Amsterdam [and] brought back a blues artist and a few bands from the US to play the festival in 1993/1994. I have three bands: symphonic, big band and rock & roll. The manager of Luther Allison saw me and invited me to play across Europe.

One year ago, there was progress when I programmed a day of blues music at NOSPR, performing with the orchestra. Three years ago I invited met Keb' Mo', so hopefully in 2016 [he will perform]. I think that Katowice is the best place for new blues bands in Poland.

In the past, there were a lot of jam sessions and now it's piecemeal. Everyone who plays at Rawa Blues often plays secondary shows. The program local bands was few, but because of the festival, in Poland there have developed 50 festivals and over 200 bands to play blues. When I started with the festival, there was only 1 festival and 1 blues. It is strong, I feel. More bands play blues, and the stars of blues that play at the festival are blown away by the young people that come to the event.

I want to try to invite as many types of blues as possible. There have always been few terms and conditions around my festival at the beginning. When I made the festival international, I needed sponsors. I got Pizza Hut and Grundig. Then I made money through television rights, but that's not the case now. 4–5 years ago, City of Gardens gave me more money and then I was able to invite artists like Robert Cray."

### Free

"Yes, this is a problem in Poland. Too many concerts for free makes it very difficult to sell tickets for Rawa Blues. I have to reduce my ticket prices or give them for free. I give about 1000 tickets for free. I still want to present what is the best in the world with the blues.

## What do you want to do?

"A two-day festival: one in NOSPR and, for the first time, the best blues musicians with the Katowice orchestra. I'm selling tickets and hotels with Novotel. We sold 60 rooms."

# **Economic Impact:**

When you come to our festival, you can't go out and we don't sell any beer or alcohol. The restaurant at Spodek prepares a special dinner, and we try to analyse this. The ticket cost is variable. I book five Polish bands, do exclusivity on the headliners, and I pay more, but I require exclusivity for that artist for all of Europe. We measure how many people are in the venue at each time:

At 11am it is about 300-400 At 3pm it is about 1000 At 5pm it is about 2000-2500 At 6pm it is about 4500-5000"

What is Lacking?

"There are some problems in that we have a lot of radio and TV, but they do not play local music and there isn't enough interest in blues The government also needs to think about the cost of living for musicians.

The cost of tickets compared to the cost of living is high; my tickets cost €15-€50. There is no blues club in Katowice. I had one in the 1980s. We need to know what has happened with blues; there are now hip-hop clubs in blues."

# AGNIESZKA MŁYNARCZYK SILESIAN PHILHARMONIC ORCHESTRA

Agnieszka Młynarczyk - Silesian Philharmonic Orchestra

# What do you want to do?

"We would like to prepare an event that can bring the world of theatre and classical music together. We have a choir in-house and want to bring that together, and focus on regional identity in that concept. We would like to realise that in other venues.

Generally, events are ticketed. There are 5 to 8 concerts per month, plus 10 special events per year. There are gigs at the venue as part of the city celebration.

It could be possible to meet and work with OFF/Tauron. Generally we are not approached, but we'd be open to it very well. Our relationship is not that collaborative."

# **Economic impact**

"We have not done [an analysis], but we only have concerts if we'll either make money or for the promotion of musical culture. In my observation, after a few years of good promotion of the philharmonic and Katowice as a place of culture, music and so on, it does affect the value of the city. It's intangible, but it does impact the city. There is a huge amount of recognition in events in Katowice. The mindset is changing here for the better. Cultural events are just another step in the city's development. Even in 5 years in Katowice, it's a big change."

# What is lacking?

"The biggest issue is financial; grant problems. There is a strong history in Katowice to promote and work with classical musicians. Culture is the best way to promote Katowice. But, generally, in population and business, thinking about 'high art' is seen as snobbish in some ways. There is a clear distinction between 'high art' and 'pop culture.' We would like to [promote] our activities as mainstream and open for everyone.

So we do jazz with classical and we are trying to do more of that - trying to be modern, open. We are thinking about working with other festivals in Katowice to prepare two projects, such as an international competition for conductors. We want to program other events across Katowice for that and want to collaborate with as many cultural institutions [as possible].

We still struggle with convincing people that we are modern. We collaborate with the city museums very well; we have a dialogue with them, like the Museum of History of Katowice, and we prepare exhibitions. For example, recording and working with a coal mine to create new creative projects."

# ANDRZEJ KALINOWSKI LOCAL PROMOTER

What percentage of your attendance is from Katowice and Silesia, compared to the rest of Poland and International?

"50% Katowice citizens, the rest people from Silesia and Poland."

How much do you spend for local marketing?

"It depends on the artist, but about 10-20%."

# How much do you spend for national and international marketing?

"National, 10%; international is not applicable."

# How many artists do you book that are from Katowice? From Silesia?

"Actually, I don't book artists from Katowice and Silesia. There aren't many of them, certainly on an artistic level, that would satisfy me. I don't make gigs with local artists at all. Mostly I promote Polish artists who are already known on the international music market, as well as those who, in their projects, aspire to enter the international music scene."

# How do you find local artists? What are the places you go to find new acts?

"Such places are few. When it comes to music clubs in the whole conurbation, it would be 2 to 3 places. In Katowice, there is one club with a professional music scene, mostly hosting heavy metal concerts or popular national artists. There are several festivals, several local cultural institutions, which organize musical events (among others), mostly with artists already well-recognized in Poland and Polish music stars. There are very few clubs and pubs equipped with appropriate and separate space for concerts. In these places there is usually only a place for DJs."

# What is most lacking for artists and their representatives, in your opinion, in Katowice? Is it marketing? Social media? Education? Etc...

"Professional marketing, I think, and a lack of media specializing in promoting the local music scene nationally and internationally."

# Do you network with other venues, festivals, promoters, and music businesses in Katowice? If not, why? If so, where? Is it done anywhere specific or in an organised fashion?

"Occasionally, I personally tried to make contacts, and even initiated some cooperation, but mostly it was reluctantly accepted. Here, there is a peculiar situation that could be described as a mutual lack of trust. [You have a] musical environment of stage music (calculated on a less-demanding audience) on one hand, and on the other the environment related to the Academy of Music: classical music, also very traditional jazz education and certain selected trends in pop music. It's a very hermetic and strongly hierarchical world, with few exceptions, and they have developed specific ways of communication. In contrast, when it comes to cooperation and meetings with promoters on the national level, especially from cities such as Warsaw, Kraków, Gdańsk, and Sopot, we meet regularly, even socially. They willingly exchange comments and suggestions, and we cooperate, even have joint projects, musical events, etc."

# In your opinion, is the local music in Katowice of high quality? And is the corresponding business (marketing, organisation, communication) of the same quality?

"It is not a level that satisfies me. And associated business? It is small: 2 to 3 concert agencies (heavy metal, blues, electronic dance music), which carry out their events on the national music scene. Local music business largely depends on the activities of local cultural institutions, the promotion policy of the city, certain political decisions and people in high positions in government offices and institutions. Very few music genres are able to exist without certain financial subsidies from local governments, and private and corporate capital insufficiently participates in the costs of implementing the musical events. Their interest is mainly limited to open music festivals in the summer. The local governments do not endorse or create a plane of interest by capital market activities specific to the culture."

# Any other thoughts?

"I would like to add something as a producer and promoter of concerts during the Jazz & Beyond Festival. When I choose artists, I rely on my experience and my taste as well as on everything that I can find in international music press. I also look into

programs of other European jazz festivals, record sales of individual artists, their recognition, awards, premieres, tours, and evaluate the current commercial status of an artist and his artistic rank, which does not always go hand in hand (we know that the jazz audience is very individualistic and critical). That's a lot of work, and a kind of passion, and I was the first persona in Upper Silesia to organize jazz concerts of high quality, a dozen years ago.

Today, I observe how many of my ideas, both repertoire and promotion, are copied by local cultural institutions that carry out similar events, which then (when I started) did nothing, absolutely nothing, in this regard. I also know that the realization of musical events, similar to our proposals by local cultural institutions, usually cost significantly more, although it does not really matter for decision-makers, who financially support primarily their own cultural institutions, treating us like some embarrassing necessity. Everything is justified by the necessity of practicing a specific cultural policy and image for the city of Katowice. What is more, a lot of concerts are for free, so people unwillingly pay for tickets even though they are quite cheap."

# KATARZYNA PRYC KINO TEATR RIALTO

"I am the manager of a cinema theatre (old, stylish, elegant). Music is a part of our activity. We try to combine film and music. We organise screenings of silent movies with jazz groups. It gives film new life, the only possibility to show young people the very old films - it creates cultural continuity.

We have very good conditions for organising concerts. The venue was built in 1913 so the acoustics are very good.

Our capacity is 260 seated, 440 standing. To rent, it'd be 600 zlotys per hour with technical equipment. The cheapest ticket is 25 zlotys, but some are 180 zlotys. The venue is subsidized by the voivodeship. It is common to do a 70/30 door deal. The bar is an agent and the bar pays the rent every month. It's a public/private partnership.

We run two cinema clubs. One is a film club for seniors. Before the screening, a piano player performs beforehand, and he is paid. The ticket price is 6 zlotys. There's another one, women's film club, where I invite musicians as well to be and be accompanied.

During summer we have a lot of outdoor events, so we don't organise much. Our activities are September to early June. We do 3 to 4 music events per month in the 8 months we do it. We also rent the venue to external promoters. We don't program according to genre. We try to do many genres and do it based on quality. Rialto is part of the regional film institute of the voivodeship.

It's only important that the band is good. It doesn't matter where they are form. It is important that the band is touring something or has a special project; mainly artists from abroad. From time-to-time it happens from Silesia."

## What is lacking?

"Promotion is the biggest challenge. There are so many interesting artists presenting works and there are so many places presenting new things. Finding the audience is difficult. The ways of promotion are still changing and it is difficult to keep up. To promote an event, you need 30-40 people to get to an audience. The greatest task is to communicate it and bring the audience to you."

### **TOMEK SZABELSKI**

# PRESIDENT OF THE INICIATYWA ASSOCIATION, COORDINATOR OF RESEARCH, SOCIAL AND CULTURAL PROJECTS

# What are you hoping to achieve?

"There are quite a few people who know this, but in December we're organising a congress of cultural managers in Katowice - 500 people from Poland and Europe. There is a discussion session dedicated to music producers for events. 5 to 6 years ago, we started talking about this, but we called it building a society across events. Artist development theory and practice is developing here. Some people in Katowice which are close to the association of cultural managers think that we need to look at audience development more. In Katowice, there is a big strength here in our events.

I do believe that Katowice is one of the top 4 markets. There is a pride in people in living in Katowice."

# What are the strengths?

"4 years ago, I started to organise the Jazz & Beyond festival after the cultural centre stopped doing it. Now I do 11 concerts in 7 cities across the region.

You have the city subsidising international artists coming to festivals. It's promotion and it keeps the festivals alive, especially in parks and new places that can show the placemaking side. There are a lot of events in the national orchestra."

# What is lacking?

"In Katowice, things are not well-prepared. Not everything is planned from a long-term perspective. What I mean by this is that quick activity is not as clear and refined as it could be, which can detract from the musical product. This is also true of the city government and the process of communication. The process of communication in Katowice is very hierarchical and when you get information you have to act very quickly, because things are more ad-hoc when they shouldn't be.

The culture in the city is so important to all of us, but we don't have a lot of people that are experienced in managing the politics of culture. It's not personal, it's processed and systemic. The process of cultural management needs to be more transparent. There needs to be more responsibilities in terms of communicating who is responsible for what.

Culture is often treated as a promotional tool. It's great that there are a lot of things going on, but [there are] too many things. I don't think the city politics are seen to love the culture as much as they should. Maybe there should be more public consultations. Maybe the city hall needs to have more town hall meetings, more commonality and more networking across cultural practitioners (festival buyers) and city hall people. There is a disconnect between the city hall and public. We need more town hall meetings, consultations and working groups. There are no cultural specific pathways to speak with the city hall. Two big issues are that the government needs to be more involved with programmers and the public in culture, and the NGOs. There needs to be an economic impact analysis done of festivals. Build a template for this. Translation is also really important.

There is a problem here with ticketing. Is it often undervalued. One free gig leads to customers wanting free tickets all the time. The value of live music is compromised, and it's a small market, so you often get tickets for free.

Katowice has too many music venues, in my opinion. There was a big research done by the government of the voivodeship to analyse the culture needs of the citizens of Silesia. 2500 people were surveyed, and there were 40 questions. It was decided that there were too many events and people cannot decide where to go, because people only have a certain amount of money. People save money for the 2 or 3 big events per year, which takes away from the smaller events. That increases subsidy. The festivals are too close to each other, which puts pressures on consumers. For example, there are 4 jazz festivals. It can be argued that this is too many jazz festivals. If there was one festival, it would be better. Tickets are either too cheap or free."

### INTERVIEWS - MUSICIANS

### **ALAN WYKPISZ**

Alan is a successful double bass player in several jazz bands, one of which has been released through Sony Music Poland. Originally from Katowice, where he attended the music academy, he moved to Krakow because of its solid infrastructure. "The scene is better and there are better venues to play," he says, citing the nightly concert opportunities and chances for professional networking (he doesn't collaborate with other genres and doesn't intend to do so). While he has been the recipient of funding, he did extensive research in order to receive it. He says funding is not a problem.

Katowice has a way to go before it reaches that level of Krakow, but it is moving in the right direction. Alan is happy to see the changes taking place.

### **KRZYSZTOF AND STANISLAW LASON**

Both full-time professional musicians in a successful folk band, both studied at the Katowice Music Academy and have been in the business for over 10 years. Stanislaw acts as the band's manager and booking agent. While they don't live directly in the city, they do believe it offers everything they would need and has many interesting developments in place.

## **JAKUB AND IGA FEDAK**

Both musicians, with Jakub working full time since last year and Iga balancing an additional part-time job, they work frequently with dance and children. They see Katowice's scene as high quality with a good community and opportunities to collaborate, such as jazz fastivals. However, they desire professional partnership, such as labels, managers, and agents, as they currently do most of this work themselves. They've had offers, such as one based out of Krakow, but time and trust are big issues. Professionals should be reliable points of reference for business and networking information.

Katowice struggles to support young, emerging artists in terms of venue availability or showcase festivals, there is a lack of musical recognition in terms of local awards. Funding is limited, attributing what funding they have received from their local council to knowing someone 'on the inside.' This lack of transparency means insider knowledge is key to receiving funding.

## **MACIEJ GARBOWSKI**

A contemporary classical musician from Katowice, Maciej works full time and has found success operating primarily abroad through a Berlin based label. He finds his biggest challenge is becoming heard outside of Poland and attracting attention, and thus wouldn't mind moving to London or Munich to focus his efforts.

Maciej would like to employ a manager, but the lack of professionals in the Polish industry makes this difficult. Instead, he has cultivated his business skills in the UK through initiatives such as Take 5 Europe. He says funding requires extensive research and is not easily available, although Places for Culture has given him the means for a new space, where he intends to offer workshops and small performance opportunities for young artists. It is expected to open in 2017.

### PRZEMYSŁAW BOROWIECKI

Przemysław Borowiecki has released almost 37 albums through various bands and projects, collaborating with artists from different genres. He came to Katowice to be inspired by its aesthetics, which have changed over the past 5 years, and he has remained because his family is now based here.

He is an active industry member with many connections, although he struggles to survive due to his lack of promotion and selling expertise. He would like a manager to help him, but these are unavailable in the area. He has also never received any funding, although it would be useful for travel or for artist education on industry practices.

### **OVERALL POSITIVES**

Katowice has great educational support in terms of contemporary classical and jazz music. Those genres also have good venue and rehearsal abilities due to their connections with the music academy. There are many noticeable initiatives in the area, and a fantastic festival scene to emphasize the quality in Katowice's contemporary, jazz, classical, electronic, and hip-hop musicians.

### **OVERALL CHALLENGES**

There is a lack of opportunity in terms of venues and performance opportunities for emerging artists, and little networking availability to build professional and artistic relationships.

Music industry education is an important but lacking area, and could be helped through workshops and coaching opportunities. The shortage of business professionals, such as managers, labels and promoters, has been cited by many of our interviewees, and is a greater Polish problem (not limited to Katowice specifically). Combined, this means artists do not have access to resources for business-minded individuals. Funding transparency is an ongoing struggle, from research to allocation to application process, and many personal connections are required in order to be successful. Limited networking opportunities prevent trust among industry players, and most endeavors must be self-sustained.

Although Katowice has high rental rates, this does not seem to be an immediate problem as people don't mind living in the suburbs and commuting.

Polish music, especially the rare pop outfit, does not have a particularly strong international image, so export strategies should be focused on in order to improve opportunities.

# 7.2 Ethical Statement

In conducting this study and acting as a consultancy in the implementation of the proposed Actions derived therefrom, Sound Diplomacy will act with respects to the best interests and representation of Instytucja Kultury Katowice - The City of Gardens Cultural Institution (IKKMO), the city of Katowice, and itself.

In keeping with our own advocacy of transparency, all decisions and actions will be communicated to IKKMO before implemented, with the understanding that IKKMO has entered into the venture on a voluntary basis.

All information collated herein will be confidential to involved parties and will not be transferred between parties without their respective permissions, such as individual survey respondents to IKKMO or the public, and report contents to the public (this is not to be confused with the separate, published declaration of proposed actions recommended to be made publicly available).

Sound Diplomacy ensures that all information collected for the report is bespoke, original, and will not be cited for future use without seeking the approval of IKKMO, as this report is strictly applicable to the project for which it has been drafted.





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