



Music Industry Project North West

Report by Burns Owens Partnership, www.bop.co.uk

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Acronyms

ACE	Arts Council England
ACE, NW	Arts Council England, North West
ACME	(Merseyside) Arts, Culture and Media Enterprise
BPI	British Phonographic Industry
CAWCI	Cheshire and Warrington Creative Industries
CIDS	Creative Industries Development Service
CIF	Creative Industries Forum
CIPS	Creative Industries Partnerships
DCMS	Department for Culture Media and Sport
DTI	Department for Trade and Industry
EDRF	European Regional Development Fund
FE	Further Education
HE	Higher Education
MC:MN	Manchester City Music Network
MDA	Music Development Agency
NWDA	Northwest Regional Development Agency
RDA	Regional Development Agency
SME	Small and medium sized enterprises
UKTI	UK Trade and Investment

1 Introduction

1.1 Purpose and Objectives

The primary focus of the project is to recommend support mechanisms for music entrepreneurs in the north west of England. Music entrepreneurs are defined as independent businesses and creators operating within the music industry in the areas of: live performance and infrastructure support, recording and media, distribution (performance and goods), new technologies, management skills and artist skills development. The music industry incorporates a myriad of genres however the primary focus of this research is pop, rock and contemporary music. The project is designed to deliver research, analysis and strategic direction.

1.2 Methodology

The commissioning body for this project is Arts Council England, North West (ACE, NW). Following a selection process, the Burns Owens Partnership (BOP), TICK Solutions and Stuart Worthington were commissioned in December 2005.

Steering Group

A Project Steering Group was established to encompass both music sector expertise and to reflect the importance of the music sector to strategic regional agencies in the north west; digital and creative industries is one of the six priority growth sectors in the north west's Regional Economic Strategy, 2006. (Steering Group Membership forms Appendix 7.1 of this Report).

Development and identification of Sector Strengths and Opportunities and Forecasting of Emerging Issues

The identification of sector strengths and opportunities and the forecasting of emerging issues facing the music sector in the north west region which shape the propositions, proposals and action plan of this Report.

Development of Strategic Direction and Final Report

Informed by the above, the strategic direction of this Final Report has been developed in consultation with the Steering Group at its interim meeting in April 2006 and by a meeting of key drivers for music in the region (see Appendix 7.2), including the five Creative Industries Partnerships (CIPs) and the existing sub-regional music development agencies, held in June.

The findings from all stages of the research and consultation are synthesised into this Final Report.

1.3 Profile of the UK Music Sector

The music sector is one of the largest creative sectors in the UK. The commercial sector forms a considerable part of the entertainment, media and innovation industries and is a key player and driver of the UK economy. It generates over 130,000 jobs, contributes £3.2bn to the economy and earns £1.3bn through exports. A conservative approximation of spend on education and training across the music sector is £3m.¹

The recording and music publishing industries in the UK are dominated by four vertically integrated entertainment corporations (EMI, Sony BMG, Universal, Warner), and the live music industry landscape is dominated by a range of vertically integrated corporations (such as Clear Channel – now Live Nation – and AEG). However, the Department for Culture Media and Sport (DCMS) states that 90% of music businesses are classified as SMEs (small and medium sized enterprises).² A recent SME music business report commissioned by the DCMS found the main characteristics of these businesses to be:

- small but larger than SMEs in general
- usually multi-function enterprises (rather than music only)
- technology-mediated businesses.

Economically they tend to have a small turnover with a mixed profit performance. The most quoted barrier to growth is 'cash flow/lack of money' followed by 'state/structure of the music industry'.³

Statistics for live music performance revenues are difficult to ascertain, however there is evidence to suggest that live music is enjoying a resurgence. A study undertaken by MORI on behalf of DCMS in 2004 reported that almost half of all venues (pubs, clubs, student unions and restaurants) surveyed (1,577 sample) had featured at least one live act in the past year.⁴ Live music in 2004 enjoyed a buoyant year with 1,833 events attracting a total audience of over 8 million people (National Arenas Association, 2005). Live music offers artists and bands additional income streams enabling them to sell CDs and other merchandise. Tours by well-established acts such as The Rolling Stones are hugely successful, despite their latest album releases failing to sell in significant numbers.⁵ Further, live performance opportunities provided by convergent and digital technologies means that artists are not confined by geographical location.

Live music can also play a prominent role in the regeneration of town and cities, adding to an area's economic prosperity. A successful venue can draw people to

¹ University of Paisley, *Sounding out the Future*, 2003

² See DCMS www.culture.gov.uk/creative_industries/music (2006)

³ DCMS/BOP, *SME Music Businesses: Business Growth and Access to Finance*, February 2006

⁴ MORI, *A survey of live music staged in England and Wales 2003/4* (DCMS), September 2004

⁵ BPI, *BPI Statistical Handbook*, 2005

an area who will contribute to the local economy. During Glastonbury 2005, for example, festival goers spent over £5m with companies who were based within 25 miles of Worthy Farm.⁶

In contrast to UK live performance, which has grown significantly over the same period, the UK recorded music industry has plateaued. While the share in the global market sales of recorded UK music has increased in recent years (from 7.6% in 1997 to 10.4% in 2004⁷), the domestic market has remained fairly steady:

Figure 1: UK Recorded Music Sales (£m at 2004 prices)

Year	2000	2001	2002	2003	2004
Turnover	£1,284	£1,327	£1,282	£1,259	£1,214

Source: BPI Statistical Handbook (2005)

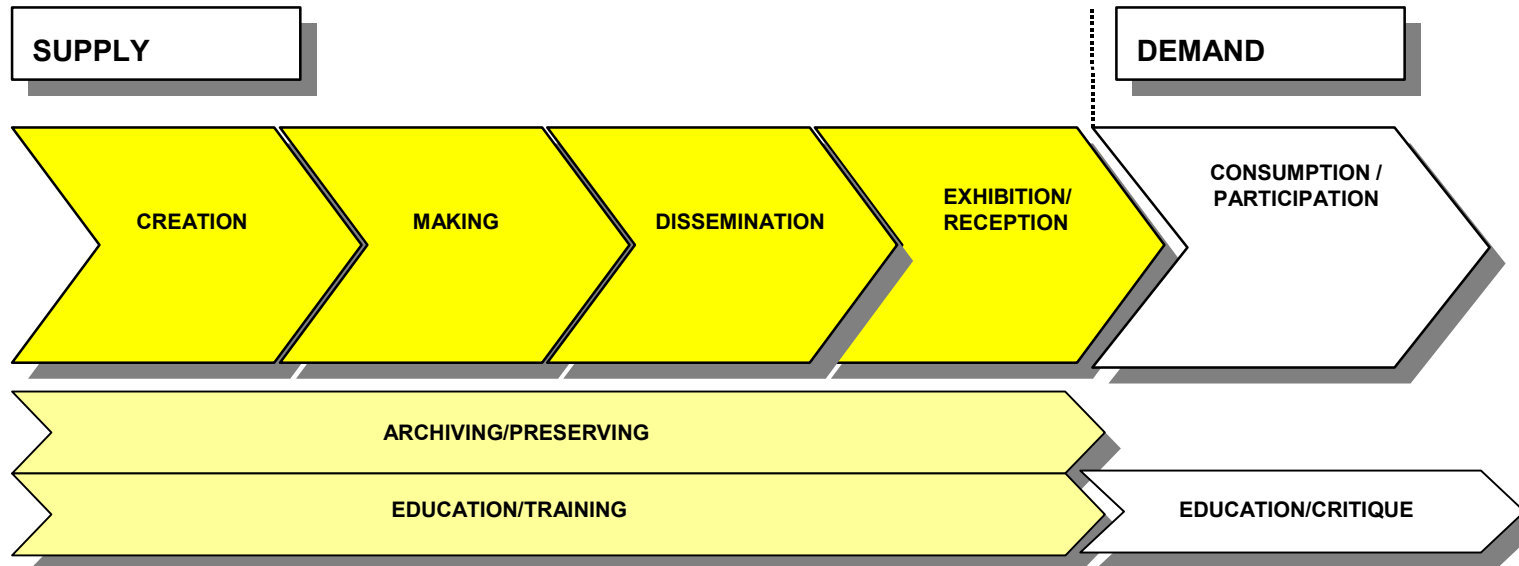
The music industry reflects the chain of production for cultural and creative industries (see Figure 2) and the various stages of the supply chain, from creation through to demand.

⁶ F Sharkey, Live music isn't just about teenage kicks, Guardian Unlimited, 15 March 2006

⁷ BPI, BPI Statistical Handbook, 2005

Figure 2: Cultural Production Chain

Source: BOP et al, 2006



Creation: content, origination, authoring, ideas.

Making: one-off production, mass reproduction, tools/infrastructure.

Dissemination: Distribution, wholesale, retail.

Exhibition/Reception: Sites of exchange of rights to consume.

A range of professional roles are undertaken at each stage of production, with linkages and overlaps between the various stages and within the sub-sectors (see Figure 3). Professional and associated services are defined as those that work within, but not exclusively to, the music industry.

Figure 3: Sub-sectors of the Music Industry

Sub-sector	Profession
Recording	Artists, instruments and equipment, rehearsal/recording spaces, production companies and personnel, mastering, artwork, packaging/formatting, manufacture/duplication, record companies, aggregators, distributors and retailers (physical and digital), collecting societies, licensees.
Publishing	Creators, publishers and agents, commissioners, libraries and retailers (hire and sale of print/sheet music), collecting societies, licensees.
Live	Artists, instrument manufacture and retail, rehearsal rooms, booking agents, concert/festival promoters, venues, production and touring personnel, equipment and facilities manufacture hire and retail, merchandisers/concessionaires.
Professional services	Management, insurers, legal advisors, accountants, sales promotion, tuition, coaching, education, trade organisations.
Associated services	Telecommunications, photography, design, radio screen and print media producers and broadcasters, theatre, fashion, games, brands (sponsorship and endorsements), hardware and software development manufacture and retail.

Creators of music and musical talent exists across the UK and, indeed, across the north west. However, infrastructure, support and professional services are currently substantially concentrated in and around London.

There is, however, a clustering of music businesses which allows artists and entrepreneurs to have access to all elements of the music production chain and sub-sectors in Manchester and Liverpool. This is a strength that needs to be optimised to ensure that the region can perform on a national and international scale. Moreover, a maximisation of resources alongside retention of talent could provide the region with an opportunity to compete more effectively with London.

As indicated by the SME Music Businesses Survey⁸ new technologies have had an enormous impact on the sector. Opportunities presented by new technologies can be demonstrated by the success of web sites such as *MySpace* where bands and artists can showcase their talent and distribute material. Potentially this can provide access to new and niche markets across the world as well as creating strong local networks. Musicians and music entrepreneurs need to understand how to exploit new technologies provided by information and communication technologies and digital media. These can offer a range of market opportunities and distribution models as well as the potential to reach new markets.

In an environment where technology is becoming central to the sector, the implications of the digital divide need to be considered. New internet connections are rising slowly (currently 56% of households have access⁹), particularly in certain demographic groups. There is, therefore, a need to ensure that discovery and development of new talent is not wholly predicated on technological ability or digital accessibility. In such a rapidly changing environment any intervention should also consider, cultural and social, as well as the economic, benefits of bridging the digital divide.

⁸ DCMS/BOP, SME Music Businesses: Business Growth and Access to Finance, February 2006

⁹ ONS, Social Trends 36, 2006

2 Music sector in the North West of England

2.1 General Context

Music from the north west has, since the 1960s, been of such high artistic quality that it is accepted as being one of the main two cultural outputs (with professional football) in which the region is regarded as being genuinely world-class. A recent study by Yahoo! Music found that the north west of England produces more hits than any other region of the UK, accounting for 25% of all number ones. England's north west achieves 45% more chart topping artists than the next best performing region – Greater London.¹⁰

The music sector in the north west is driven by a mix of cultural, economic, commercial, social, environmental and community factors which make the sector place specific. Equally, music and related activities are also *drivers* and *influencers* of a wide range of economic and social outputs such as the regeneration of inner-city areas, the resurgence of night-time economies and the educational attainment and inclusion of young people.

It is difficult to capture and quantify the north west music industry in economic and business terms due to governmental classification of economic activity data.¹¹ However, it is clear that the music sector offers, both directly and indirectly, a variety of career and employment opportunities (see Figure 3). In the wider economy, live performance generates income for the tourist and leisure economies. Locally produced live music is also a key driver of the night-time economy, stimulating demands for food and drink consumption, hotel beds and transport as well as fashion and merchandising.

The cultural benefits of music in the region are widespread, in terms of, as examples, identity and participation, heritage, tourism destinations and branding; Marketing Manchester identifies music as one of its 'slipstream' tourist brands.

In the region's larger cities music has also contributed to the physical regeneration of derelict inner-city areas. In Manchester Sankey's Soap nightclub was important to the regeneration of Ancoats, the Haçienda helped drive the

¹⁰ The Independent, Liverpool and Manchester united at top of the pops, 4 July 2006

¹¹ Standard Industrial Classification (SIC) is the main taxonomy used to classify economic activities in the UK. Only music publishing and the manufacture of musical instruments are the two activities that can be discretely identified within the SIC that are music related. Other elements of the music industry, for instance record labels, recording studios, managers, promoters, record shops and live music venues, are aggregated together within the SIC with other non-music activities.

regeneration of Castlefield, and the music-driven night-time economy of the Gay Village has generated millions of pounds of investment for the Canal Street area, a critical inner-city area between Piccadilly and the Oxford Road university campuses.

Liverpool's leisure and lifestyle economies are driven by its musical heritage and contemporary music scene. The Beatles legacy has provided the opportunity to develop the Mathew Street area, which is a popular tourist attraction and night-time destination. The club Cream, which is now closed, established Creamfields in Liverpool which is one of the largest dance festivals in the UK, attracting 45,000 attendees in 2005.

There is a perception within the north west, in line with national evidence, that live music is experiencing a renaissance. During the consultation it was noted that Manchester and Liverpool often attract 2500 students to city centre midweek music events during term time. For each of the past four years (2001-2004), the Manchester Evening News Arena has been nominated 'International Venue of the Year' in the Pollstar concert industry awards. In 2003 and 2004, it achieved recognition as 'Busiest Arena Venue In The World' based on concert ticket sales, beating all other European and American indoor venues.

Live music initiatives in the region include the local blues festivals in East Lancashire, primarily in Burnley and Colne, which have driven local tourism, developed the night-time economy and support a high number of live performance venues. Other parts of the sub-region have benefited from bustling local music scenes, for example, cabaret in Blackpool.

Substantial public sector resources are committed to the music sector through the region's major universities and colleges. The University of Salford has a Chair of Popular Music and runs degree, post-graduate and PhD courses; Liverpool Institute for Performing Arts (LIPA) has 200 students and 150 people benefiting from the New Deal for Musicians; City College Manchester has over 350 music students and over 1,000 New Deal for Musicians clients; the University of Liverpool has an Institute of Popular Music which has recently expanded to a full research and teaching unit.

These institutions have invested substantial sums in providing practice facilities, high technology recording studios and supporting technicians. Many also have production, marketing, and professional support, including their own labels. However, due to resource pressures, holidays and weekend closures, many of these public sector funded resources are unused for substantial periods. When in use they are often accessible only to students of the institute.

Current funding streams do not encourage a systematic joined up approach between HE/FE and the music industry. Education is, however, a key "planet" (see section 2.2) in the future development of the sector with several examples of industry relevant practice being developed by HEIs in the region. There is an opportunity to examine how to connect and better disseminate innovations in HE and FE to the music industry and creative individuals, and indeed between HEIs, as well as how to make HE facilities more accessible to music entrepreneurs.

Additionally, there is huge potential for audience development throughout the student population. The region has the highest concentration of universities in

Europe. Manchester, for example, has the highest student population of any city in the UK at 78,000.¹²

The Manchester City Growth Strategy (CGS), which targets the south of the city, identifies music as a key economic asset that needs to be developed further. This research supports the recommendations of a recently produced report for the area. The report's recommendations include additional support for local music businesses, the development of a live music infrastructure, exploiting digital music distribution, and growing global music talent.¹³

2.2 The “Planets”

The structure of the music sector in the north west of England is ostensibly supported by many different bodies. These are represented by the “planets” (see Figure 4). The “planets” are not sub-sectors within the industry e.g. recording or publishing (see Figure 3), they are essentially the sources of development, training, support or advice, financial or otherwise that music entrepreneurs may access for business and artistic development. The “planets” can operate autonomously as well as develop mutually beneficial relationships (some of which already exist). The “planets” however often duplicate activity or compete and this consultation indicates that future joint ventures could be coordinated more effectively.

The “planets” include public and commercial sector organisations, with programmes or projects often undertaken in partnership between the public and commercial sectors. As already indicated, the commercial sector is an effective driver of the music industry both regionally and nationally.

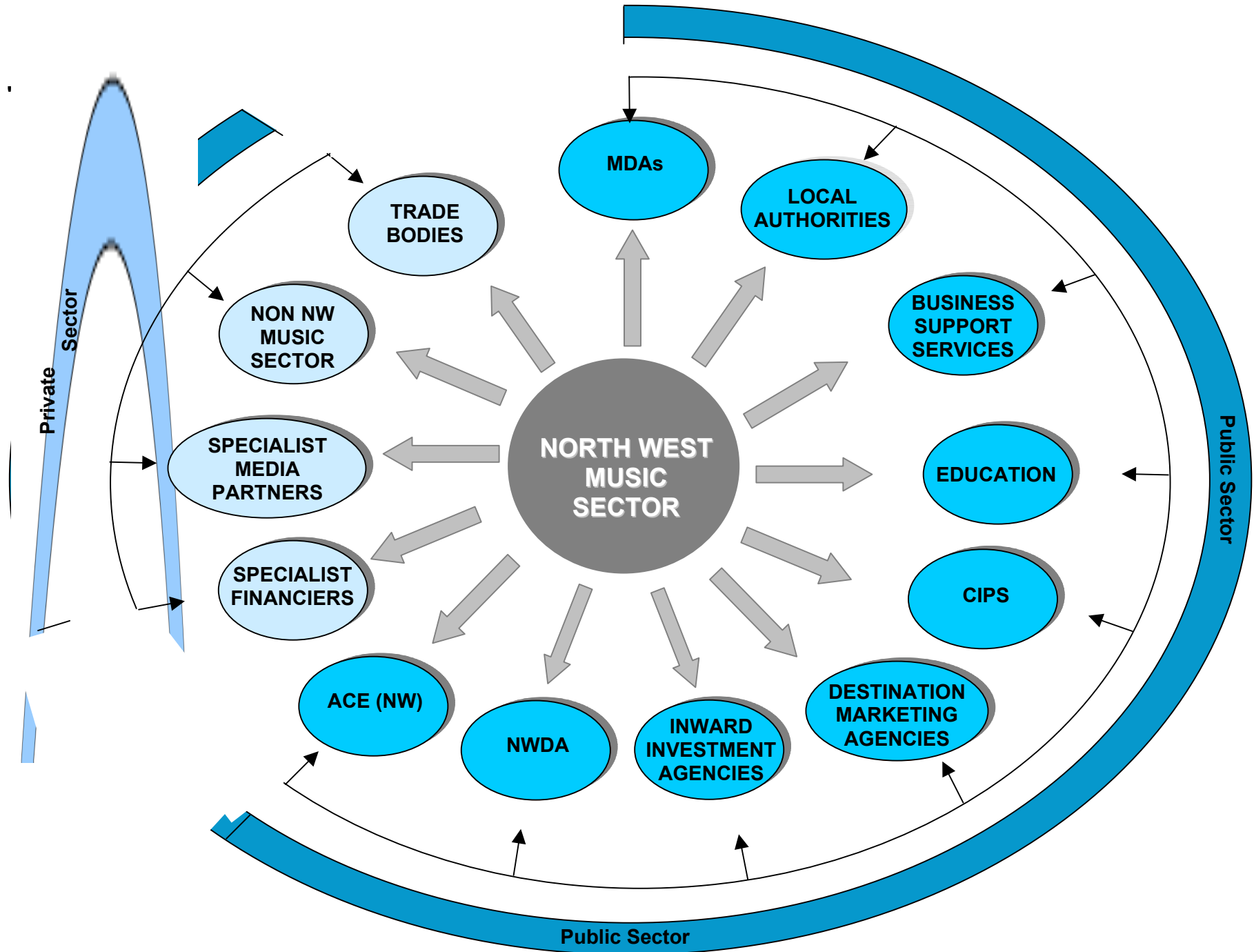
Figure 4 is a representation of current support accessible to the north west music sector with an indication of their existing formal relationships (either regular and/or ad hoc), though this is not exhaustive.

There is currently no overarching music strategy or lead organisation within the region, therefore information sharing, communication and joint working is often patchy and frequently non-existent. The CIPs do offer support but this is not specialised and the MDAs have been restricted by geographical reach. This needs to be addressed. If the region is to have a coordinated strategic approach to the music industry and effectively support music entrepreneurs and artists then the role of the “planets”, both individually and collectively, should be considered by any structure that is established.

¹² Government Office for the North West, 2006

¹³ Manchester City Council, Manchester City Growth Strategies Priorities, 2006

Figure 4: The '



2.3 Developing the Music Entrepreneur Profile

The commercial music sector is successful in discovering and developing new talent. However, consultation confirmed that it can offer limited opportunities, and indeed there are barriers to growth, for music entrepreneurs and creative individuals in terms of gender and particular music genres.

Practitioners and followers of particular genres may have little in common with the north west music heritage and as a consequence are often ignored or excluded by the mainstream music industry. Examples include grime in the inner-cities¹⁴ and British Asian niche markets. There is a need to capture and nurture the talent that the commercial market fails to recognise. There are a number of reasons for failure of the commercial market in tapping into these markets. Performances are not always attended by A&R people, opportunities for performance are limited and some groups/genres feel excluded or disenfranchised by the mainstream music industry.

The profile of the music entrepreneur has, therefore, remained homogenous and budding entrepreneurs can often be pigeon-holed and stereotyped. Artists and entrepreneurs operating in areas of experimentation, research and high risk projects are also often excluded due to the music industry's reliance on market forces.

There is a need to widen access to support structures, showcasing opportunities and encourage investment by music and business angels in order to profile and nurture this untapped talent in the north west, particularly those not currently being identified by the commercial music sector. These new entrepreneurs should also be encouraged to reach markets and audiences outside the north west, nationally and internationally, especially where there may be international niche markets for their product, as well as develop audiences within the region in order to develop profitable businesses.

¹⁴ This sub-genre is one of the latest to evolve from the over-arching genre known as 'urban' music, is a direct descendant from the 'hip hop' genre, and is highly popular with young people in (often deprived) inner city areas.

3 Research

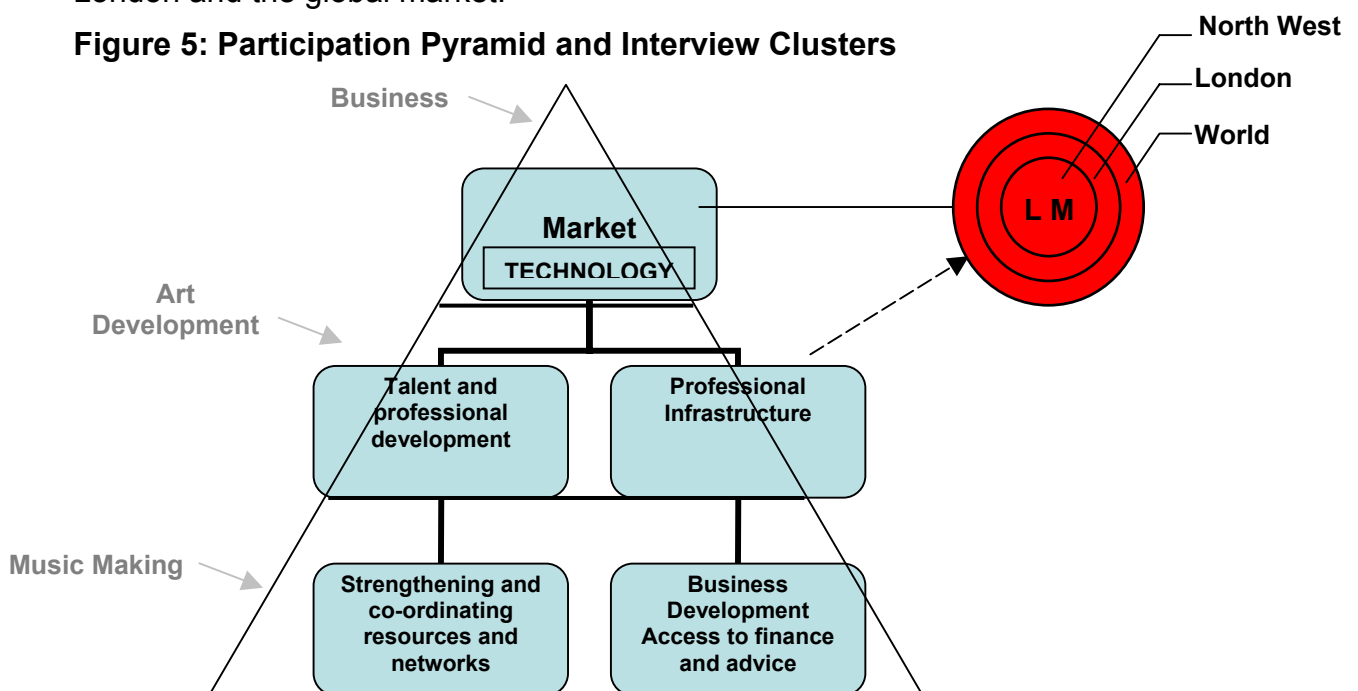
3.1 Consultation Process and Analysis

An extensive consultation process was undertaken with over 50 music entrepreneurs in the north west including artists, artist managers, venue managers and music specialists in the professions. The semi-structured interviews were mainly face-to-face with a small number being telephone based. The areas for discussion were:

- Organisation and service provided by consultee (where relevant)
- Barriers to entry for music entrepreneurs
- Infrastructure of the music industry (including services and support)
- Technology and digital media
- Drivers for the future music industry
- Research recommendations.

The interview analysis is illustrated by the diagram below (Figure 5). The pyramid in the background indicates participation in music, from music making to the development of a music business. The diagram in the foreground represents the main clusters of issues arising from the interview analysis. These represent the areas that the consultees believe are most important in terms of barriers to growth, current gaps in provision and key drivers of the music industry in the region. There is a concentration of music entrepreneurs in Liverpool and Manchester (indicated by 'L' and 'M' on the diagram); consultation found that opportunities exist to create a hub-and-spoke mechanism to deliver music industry support across the north west, with the main provision of services being in Liverpool and Manchester. This could position the region more favourably with London and the global market.

Figure 5: Participation Pyramid and Interview Clusters



Music making – this covers participation in music in the broadest sense and is supported by a wide range of community, educational and cultural projects. The budding music entrepreneur will begin their journey at this level, therefore there is a need to ensure that support services at this stage are robust.

Art development – this is the stage at which talented music entrepreneurs need to be developed and prepared for the commercial market. By, for example, signposting career pathways and encouraging portfolio employment in the industry. Equally, there should be an emphasis on professional skills development accredited by the individual. Whilst the north west has and can draw on skills from London, the main centres of the north west can provide employment opportunities for professional support services which regional music entrepreneurs could utilise.

Business – This is driven by the commercial music sector. At this stage the music entrepreneur is established as a (profitable) business and is contributing to the music economy.

In the absence of a national music policy or strategy, the debate in the north west has often centred upon whether the industry would be best served by a regional music development agency, or whether more localised agencies would be appropriate. The evidence from the consultation suggests that business and sector support is best served by a dual-centred approach, principally based in Liverpool and Manchester where most activity is centred (with recognition that they are distinct) which can be accessed by the rest of the region. The sub-regions outside of the two cities need a mechanism whereby they feel less isolated, particularly in the more rural areas where basic infrastructure such as transport, access to venues and rehearsal spaces is considered a barrier to growth. However, music was cited as a key driver to developing the night-time economy in towns and cities outside of Liverpool and Manchester, particularly in Cumbria and Lancashire.

Expertise and best practice needs to be transferred throughout the region through a hub-and-spoke mechanism. There is little support for meta-networking

events at regional level which is mainly due to geographical barriers, unless they are specific opportunities such as those provided by 'In The City'.

Consultation Summary

- The consultees were unanimous that specialist, not generic, support is needed.
- Access to sector specific business development and financial advice is one of the main barriers to growth for the music sector in the north west.
- Budding entrepreneurs are presented with a range of generic advice when specialist support is needed.
- The agencies that exist often duplicate resources and fail to signpost to other industry relevant business support and provide appropriate financial guidance.
- There is widespread support for strengthening and coordinating existing resources and local networks including bringing networks together more frequently and ensuring they are accessible.
- Networks provide a good opportunity to introduce new music entrepreneurs to experienced professionals for informal mentoring sessions.
- Technology is changing the face of the industry at a fast pace; affecting creation, production, distribution and producing new business models. The opportunities and challenges for the north west music sector need to be fully understood. The potential for a new digital-based infrastructure for the region should be explored further.

3.2 Best Practice

The project findings are informed by a review of best practice of infrastructure support for the music sector in other regions in the UK and, where appropriate, internationally. A review of current provision within the north west was also undertaken. Figure 6 categorises a range of examples of support structures and showcasing events that were examined.

Figure 6: Examples of best practice

International music agencies	National	Rosa (Danish Rock Council)	Showcasing events	SONAR (Spain)	North west support structures	CIPS	CIDS
		NPI (Dutch Rock & Pop Institute)					ACME
		Welsh Music Foundation		SxSW (USA)			CL/CC/CAWCI
	Export	Music Export Finland				Music agencies	MC:MN
		French Music Bureau		MIDEM (Europe)			MDA
		Federation of Music Collectives Ireland		ITC (Manchester)			Root Music
	Specialist	FACTOR (Canada)					

See footnote 16 for CIPs in full.

Showcasing events include the international new music convention 'In The City' which is based in Manchester and is attended by over 3000 music industry professionals. 'In The City' is celebrating its 15th birthday in October 2006 and is cited as having the highest signing ratio of any music convention in the world. 'In The City' acts as a regional catalyst for talent, both locally and nationally, showcasing established bands and unsigned acts. Its strengths could be drawn on further, particularly as British presence at overseas showcasing events is frequently dominated by acts based in London and international showcasing events are often expensive to attend.

International examples reviewed vary in their scope. They all provide a national focus for services and support mechanisms, particularly in the rock and pop genres, however, some have a narrower remit than others. For instance, Music Export Finland and the French Music Bureau are primarily tasked with marketing home produced rock and pop to the international market, whilst others have more specialist functions. Applying these examples to the north west is problematic as they are national agencies with nationally defined strategic objectives.

None of the national public sector organisations associated with music in the UK (principally DTI, DCMS, UKTI, and ACE) has published a national strategy for the music industry. The sector falls within the generalised DCMS Creative Industries Strategy, and in practice the responsibility for sector development has been devolved to the individual regions, without specifically allocated supporting funding. From this several different regional models have evolved. The Creative Economy Programme (recently launched by the DCMS) initiated further discussion about the role of the music industry and may provide an opportunity to discuss the absence of a national policy and its implications.

At 'In The City' in 2005, a 'Mini Summit' of representatives from each of the UK regional funding bodies whose strategy includes developing the music industry (principally the RDAs and UKTI) met to share information and best practice. What became clear was that there was little uniformity about how the various regions had approached implementation. In the north east, a regional music agency (Generator¹⁵) has been established. In the north west development is principally left to the sub-regional CIPs. In the Midlands, the development work has been undertaken by the University of Central England while other regions nominated various other bodies such as radio stations and business support agencies to lead. A key conclusion of the meeting was that there is no single approach to providing support for the sector and that regional infrastructure was generally driven by local considerations rather than a consistent model. It was felt that this was primarily due to a lack of a national strategy to identify priorities and guide intervention.

This demonstrates that looking to apply an 'off-the-shelf' model to the north west region of England is fruitless; structures emerge within specific contexts and in response to particular needs. There is no single applicable **model** and that different regions should evolve individual models to suit their own circumstances.

¹⁵ Generator was frequently cited in the consultation as model of good practice though there was some concern that this model could not be applied as the north west due to the less established sense of regional identity.

The north west could, however, provide an example of an **approach** that, if effective, could inform best practice for other regions.

3.3 Support Structures: north west

3.3.1 Creative Industry Partnerships

The Creative Industries Strategy for England's northwest, NWDA 2002, identifies music as one of the five creative industry sub-clusters with the potential for growth in the region; however, no detailed action plan has been developed for the music sector.

The Strategy recommends the development of appropriate sub-regional structures to offer co-ordinated support and initiatives to creative industries in the region. The CIPs have now been established in each of the sub-regions of the north west¹⁶ to support and develop creative businesses and to accelerate the growth and development of a strong and vibrant creative industries sector as an integral part of promoting the north west as a dynamic region of creative excellence.

The objectives of the CIPs are to:

- Identify and encourage innovative and dynamic businesses which have the capacity to grow and to contribute to the region's competitiveness, generate employment and contribute to wider policy agendas such as social inclusion
- Increase local and global markets for the region's creative industries
- Add value to other businesses and sectors.

In the absence of a regional strategy or action plan for music, policy decisions for the music sector have been effectively set by the two longest established CIPs, Merseyside ACME and CIDS in Manchester both of whom have been co-financed by European Structural Funds. Both CIDS and Merseyside ACME have provided specialist music support through partnerships with the music development agencies based in the region. CIDS contracted the supply of specialist music services to Manchester City Music Network (MC: MN) (see section 3.3.2) which was originally contracted direct to the City Council, but is currently suspended (see section 3.3.2). Merseyside ACME works closely with the Music Development Agency (MDA section 3.3.2) to provide music specialist support, funding for MDA is also time-limited and its activities are often constrained by the geographical limitations of European funding¹⁷ and economic outputs.

¹⁶ CIDS (Creative Industries Development Service), Merseyside ACME (Arts, Culture and Media Enterprise), Creative Lancashire, Creative Cumbria, CAWCI (Cheshire and Warrington Creative Industries).

¹⁷ MDA is a partner in a recent £3m support package, co-financed by Merseyside's Objective One Programme, 'Creative Bias Creative Advantage', with ACME, Knowsley Metropolitan Borough Council and Creative Partnerships Merseyside. This initiative will provide business support for creative businesses across Merseyside to generate investment and employment in the region.

The other sub-regional CIPs are Creative Cumbria, Creative Lancashire and Cheshire and Warrington Creative Industries (CAWCI). These are newly established and do not intend to set up sub-regional music specific support agencies but instead to signpost the sector effectively to specialist support that exists regionally and to inform the delivery of that support based on an analysis of the needs of local music businesses. This reflects the significant clusters of music businesses in Liverpool and Manchester. However, the music agencies based in Liverpool and Manchester do not have a region-wide remit (or funding to deliver such). In the absence of regional coverage support in the sub-regions is likely to be highly patchy.

The North West Regional Economic Strategy (RES) 2006 identifies the Digital and Creative Industries as a priority sector within its cluster programme. The Skills and Education section of the RES includes the Digital and Creative Industries as one of the sectors that NWDA will work with the Sector Skills Councils to deliver the 'skills needs of sectors and growth opportunities.' Adding that 'developing appropriate skills for priority sectors is essential to support growth.' Action Point 28 also (continues to) identify the Creative Industries as a sector with which NWDA will work with sub-regional partnerships to 'deliver the skills required to maximise the economic impact of key growth opportunities'.

The CIPs are beginning to establish a regionally coordinated approach to creative industries development in the region through Creative Industries Forum (CIF) NW, working, for instance, with the Head of Digital and Creative Industries at NWDA to develop a regional web portal for the creative industries.

A coordinated approach between the sub-regional CIPs, ACE, NW and NWDA could inform and underpin the development of infrastructure support for music entrepreneurs strategically by both signposting music entrepreneurs accessing the CIPs and regional portal to specialist support via a Music Driver (with the ability and funding) to work across the region and by undertaking business support diagnostics in the sub-regions which will inform the services a Music Driver should offer.

Consultation with both the established and newly formed CIPs found that, due to the size of the music sector, its degree of specialism, its potential for growth and the speed of technological and market innovation, there is a need for a tailor-made initiative for the music sector that will both work with and add significant value to the existing CIPs infrastructure, provide current industry relevant knowledge and expertise to music entrepreneurs and develop new business for the music industry in the region.

3.3.2 Music Agencies

The agencies based in Manchester and Liverpool respectively, and considered as exemplars of good practice in the region, are MC:MN (Manchester City Music Network) and MDA. There are many examples of tools and services developed by MC:MN and MDA that need to be examined in more detail to understand more fully what is effective, industry relevant, identify possible gaps in provision

Merseyside ACME and Partners Secure £3m support package (press release 23 September 2005).

and what can be developed further. This is an imperative as the current phase of the European Structural Funds, which has substantially funded both agencies, is coming to an end in 2007.

MC:MN (Manchester City Music Network)

MC:MN was established in 1999 to 'support the developing infrastructure of the Manchester music industry.' It was set up to offer a range of business support activities to the music industry and act as a cross-sector Trade Association of Manchester-based independent music businesses, and as such it is an industry-led organisation. MC:MN became the specialist music support agency for parts of Greater Manchester, sub-contracted to provide business support to the sector by CIDS, and supported by ERDF (European Regional Development Fund). MC:MN exists as a legal entity but became dormant when its ERDF funded project was completed, in accordance with the exit strategy, on 31 December 2005. No further funding has been identified to continue this work and a final decision on its continued existence will be taken following this research.

MDA (Music Development Agency)

Previously MMDA (Merseyside Music Development Agency), MDA was originally established in 1997 and became MDA in 2005. The change of name enabled MDA to broaden its geographical and funding remit beyond Merseyside. There are two main elements to its work; 'Creative Bias Creative Advantage' focuses on economic growth across creative sub-sectors and provides advice, training, mentoring and networking opportunities. In September 2005 MDA, Merseyside ACME and partners received £3m to deliver Creative Bias Creative Advantage until June 2007, this funding is geographically limited to Merseyside (see footnote 17). Further projects include a proposal for the development of MDA PIMS (Project Information Management System), a range of initiatives to encourage industry networking, exploitation of digital communications, access to resources/advice and international trade opportunities and working collaboratively with other specialist intermediary organisations, mainstream business support providers and the music industry.

Root Music

Root Music was the Music Development Agency for Oldham, established in 2003 and closed in March 2006 due to cessation of funding. Root Music provided routes to the sector for young people in Oldham, helping to identify possible funding for musicians and providing advice to those aiming to become self-employed music entrepreneurs. Its overall objective was to help people through to self-employment, offering guidance and support for musicians, promoters, teachers, trainers, producers, and entrepreneurs looking to develop a career in the music industry.

Funding

Each of the Music Development Agencies were/are constrained by being reliant on funding streams that are geographically limited in focus resulting in delivery of services being restricted to certain parts of the region, such as European

Regional Development Funds, and by major sources of funding being primarily, and in some cases exclusively, tied to economic outputs. Each MDA interviewed expressed frustration at being unable to fulfil its potential development role across the different parts of the cultural production chain, from music making, to art development to business, due to the limitations of available funding.

A more strategic and joined-up approach to financing support mechanisms for music entrepreneurs, with innovative partnerships between regional agencies, could enable support of the different parts of the cultural production chain, from creation through to consumption, join up economic, social and cultural outputs and achieve region-wide reach.

4 Propositions

Based on the research and consultation outlined, the following propositions are set out to summarise the key findings and define clearly the limits and possibilities of actions arising from this work.

1. Public sector investment both direct (from cultural funding) and indirect (through regeneration and other funds) has had a positive impact on the development of music in the north west. This investment has brought new talent to new markets and helped to retain the position of the UK as a major producer.
2. While the public sector/ACE can and does influence the commercial market, it cannot¹⁸ do so directly. Therefore, forms of intervention must seek to assess the 'tipping point' between public sector investment and private sector gain, particularly as this is a highly commercially driven sector, considerably more than, for example, theatre. These indirect economic impacts are part of a wider debate about the role of ACE in the creative industries which is currently gathering momentum.
3. One creative industry operates in a distinct way from others, this is also true within particular sub-sectors; visual arts are different from the music, classical music is different from contemporary music. ACE needs a subtle, well-attuned understanding of the music sector in order to assess barriers for artists, and plan and implement appropriate interventions.
4. The music sector is a key element in the building of cultural and social (as well as economic) capital and is therefore linked to a range of other agendas and organisations at regional and national level (such as RDAs, DTI, broadcasting media, etc.). ACE is operating within a complex network of other providers and needs to have a clear sense of where linkages are and how they work.
5. The music sector is closely related to a particular time and place; this cultural milieu (usually urban) both benefits from and is reflected in songs and music. The north west region and particularly Manchester and Liverpool have an extraordinarily rich heritage in music which benefits the region in multifarious ways. This story is not well-enough understood or promoted.
6. ACE, NW has a particular role in encouraging and advocating for the sector to other partners. Being confident and knowledgeable about the sector will allow ACE, NW to establish effective partnerships and new forms of investment for example with NWDA.

¹⁸ The Arts Council is established by royal charter and a registered charity; its budget is entirely drawn from public funds and is therefore prohibited from commercial intervention.

7. Any intervention requires an evaluation of what has been achieved and how; this has not, hitherto, been a priority. It is important to gather clear evidence both qualitative and quantitative, and put in place a means of ensuring 'quality control' throughout the lifetime of a project.
8. The chain of creation, distribution and consumption in music is not sufficiently researched in the region to provide evidence on crucial issues such as points of entry (where the talent comes from) and the critical role of higher and further education both formally and informally. There are particular barriers to progression for sub-sectors and genres in the commercial music sector. ACE, NW needs to consider how interventions focused on such groups can have a positive impact in bringing them to market.
9. ACE needs to be more conscious and aware of its potential impact in the music sector so that planning for interventions can be more targeted, investment can be coordinated across the planets, and outcomes can be carefully measured in order to inform future plans.
10. A more strategic and joined-up approach to financing support mechanisms for music entrepreneurs, with innovative partnerships between regional agencies, could enable support of the different parts of the cultural production chain, from creation through to consumption, join up economic, social and cultural outputs and achieve region-wide reach. This requires a joint approach to the music sector by ACE, NW and NWDA.

5 Proposals

The research findings which form the basis of this report identified four key themes. The first two themes, key influencing factors and spatial, have informed the recommendations of this report. The latter two, structural and delivery, are to be considered when designing the framework of the Music Driver as outlined in the action plan (see section 6) and is subject to a separate work stream.

The themes:

- **Influencing factors:** including the key issues arising from the consultation process, current economic and cultural policy (including major events – cultural, civic and directly music related), and identifying and developing genuine music talent and entrepreneurship.
- **Spatial:** the geographical issues which are crucial to success; the consultation found that there is a need for an overarching service, however this will be primary based in the two city regions of Manchester and Liverpool.
- **Structural:** the design of an appropriate structure is the next phase following this report; the design needs to consider leadership, partnerships and the infrastructure of the Music Driver.
- **Delivery:** these are specific interventions, initiatives and projects that need to be established; provision of services are recommended in section 5.2.

5.1 Music Driver

This report recommends that a specific body should be established that will act as a driver across the music industry in the north west. This body should be set up for a limited time period. Throughout its duration it will act as a broker to enhance existing relationships and forge new ones. By the end of its lifetime these relationships should be robust enough to support north west music entrepreneurs and the wider industry.

The Music Driver will consult and liaise with the “planets” as identified in section 2.2. The Music Driver will consist of a small industry-relevant team. The Music Driver must avoid duplication and build on and coordinate existing provision. It will also broker new relationships as well as support those that already exist. Investment over a short period will provide medium to long term benefits. This body will be independent and transparent with clear objectives and an exit strategy.

While it is important to recognise the needs of the sector elsewhere in the region and ensure they are provided for, it is unrealistic to imagine that the same level of demand will be present outside the city regions of Liverpool and Manchester.

The Music Driver must be answerable to industry and also to the regional offices of ACE and NWDA. However, it must retain its independence, particularly in terms of being able to take risks, and this independence needs to be firmly guarded by ACE, NW and NWDA.

The Music Driver should be initiated by ACE, NW and the NWDA, but not branded as either agency. ACE, NW and the NWDA need to work together to identify where their respective objectives meet and therefore joint action is appropriate. Together these two regional organisations need to consider where and how the Music Driver can influence other providers (as appropriate) as partners or deliverers of particular services.

The Music Driver will fulfill the following criteria:

1. Operate as industry knowledgeable and credible, independent and risk taking.
2. Develop entrepreneurial businesses and attract those that do not usually approach the public sector.
3. Expand the profile of the music entrepreneur into specific and diverse markets.
4. Spot new market opportunities e.g. urban grime, cabaret.
5. Build on the existing experience of, and good practice developed by, MDA and MC:MN.
6. Operate region-wide with recognition that Manchester and Liverpool have particular strengths.
7. Deliver cultural benefits alongside economic benefits.
8. Network with the CIPS (and other generic providers) to offer industry relevant business expertise designed to generate growth.
9. Expand and develop investment opportunities through growing a higher profile with business angels and other financiers such as TEChINVEST within the region and beyond.
10. Promote the north west music brand, nationally and internationally, as part of wider strategies e.g. marketing, tourism, night-time economy (including rural areas).

As there are a plethora of mechanisms through which the range of support (see Figure 4, the “planets”) is currently delivered, it is crucial that existing networks and services be strengthened, utilised and function cohesively. The Music Driver will also perform an advocacy role between these various partners and providers.

5.2 Provision of Services

The following are the range of services that the Music Driver should consider developing. However, most of these services exist throughout the region and the Music Driver should consider where services need to be consolidated or specialised.

1. Business support/advice

Business support mechanisms are undergoing significant change nationally and are now the responsibility of the Regional Development Agencies (RDAs). A new brokering model is being introduced to ensure that the advice and support offered is 'fit for purpose' and carefully matched to the needs of specific sectors and businesses.

Much of the existing generic support for the sector in the north west is regarded as unhelpful, excepting that from specialist agencies, and the sector is keen to see this specialist advice made more generally available and properly supported. The focus needs to be on existing services that can be developed, possibly with industry relevant accreditation.

2. Finance

There are critical growth moments in a business cycle where investment is vital. It is felt that existing mechanisms are too unfocused (a grant-based culture) or too difficult to access (major financial players).

It is recommended that key agencies should collaborate on the design of an open, clear and transparent process to provide tailored support to achieve specific high growth (step change) through small bursaries, a creative Intellectual Property fund, and more general financial advice (from information about benefits to access to venture capital).

3. Career signposting

The link between the industry and HE/FE provision is identified as particularly in need of strengthening. Even between institutions there is little shared knowledge or concerted action which is resulting in duplication and a loss of momentum.

It is recommended that an effective structure be put in place to map career pathways for students, artists and music industry workers to engender more productive links with the sector designed to promote sustainable careers in the music industry in the region. This should be available at various career stages not just at entry level.

4. Networking

Networking is critical to industry growth both within the region and beyond particularly to access markets, skills and expertise, participate and drive industry debates and access speakers of national and international importance.

Much of the investment in formal networks has been short-term and fragile (for example, MC:MN's ERDF support has now ended).

Some networks already exist in the north west but most are viewed as small and cliquey; there needs to be a way that newcomers to the industry can network with those who are more established in their field. It is important that networking operates at a local level, however there is also a need for linking up across the region, ensuring sub-regional inclusion.

5. Showcasing talent

There has been considerable success in exporting music and exposing talent to emerging national and international by 'In The City'. This has also brought a London presence to the region. There may be possibilities to build on the success of 'In The City' by acting as a catalyst for partnerships between public and commercial sectors. Showcasing events are important for developing new audiences and interest in live performance artists and bands.

Midem (Europe) and SxSW (USA) are considered the main vehicles for showcasing local talent to a world audience and the north west should consider how best to approach this more systematically, particularly as London artists almost totally dominate the UK trade missions, ensuring that north west music entrepreneurs are export-ready.

Within the region Youth Music Action Zones (under 18s) include MZONE (Merseyside) and GMMAZ (Greater Manchester). These organisations can be a catalyst for talent identification and the nurturing of new talent.

6. Industry infrastructure

Infrastructure, for example rehearsal space and venues, is less a problem in Liverpool and Manchester than it is in the rest of the region, particularly in rural areas. Access to space including studios, rehearsal and incubation space is, in general, declining. Mapping existing rehearsal space and opening access to higher education institutions' facilities to the wider community need to be further investigated.

Additionally, certain genres, for example grime, have difficulty in finding venues to host their acts; there is a need here for support and advocacy.

This is particularly important if the region is to take full advantage of the live music renaissance.

7. Mentoring

Many of the consultees were enthusiastic about peer-to-peer learning opportunities and traditional mentoring schemes. These can provide positive specialist support for sub-sectors at all levels, particularly in relation to expanding into new markets. However, it should be emphasised that the success of such schemes is predicated on careful and specific matching of both parties.

Valuable as this is, the cost of effective implementation is high – it is labour intensive and often requires long-term commitment. It is therefore recommended that this is a lower priority and that the existing resources available should concentrate on initiatives that can ensure best value for money.

6 Action Plan

The overall findings of this work indicate a consensus from all key stakeholders and music entrepreneurs in establishing a tailor-made initiative that will add significant value to the existing infrastructure and develop new business for the music sector in the region. This research has been funded by Arts Council England, North West but it is clear that any further developments will need to be supported by a wider constituency, particularly the Northwest Regional Development agency.

Within the sector, across the region, expectations have been raised and there is a cautious optimism that a timely intervention could be critical in 'raising the game' as long as it is industry friendly and business focused.

In order to develop the design of this Music Driver, there are three key tasks to be undertaken. The consultation urged speed and a light touch to move swiftly through these tasks and look to establish the Music Driver expeditiously. The three tasks are outlined below. It is suggested that all three should take place simultaneously over a period of four to five months. This will capture the maximum value from the dissemination and review processes outlined in tasks one and two.

In addition, we suggest that two specific pieces of action research could be piloted regarding maximising resources for the music industry by joint action with Higher and Further Education in the North West region.

1. Consideration of Dissemination Routes and Protocols

The following dissemination routes are recommended:

Arts Council England, North West as the commissioning body	An initial presentation of the Final Report will be made to the management team at Arts Council England, North West with a view to informing wider consideration of its support for the creative industries and a joint approach to provision for the music industry with Northwest Regional Development Agency.
Department for Culture Media and Sport (DCMS)	Dissemination to the DCMS to be undertaken by Arts Council England, North West.
NWDA, as the key partner in regional economic development	To be advised by Peter Mearns and Iain Bennett in terms of the Digital and Creative Industries cluster and Executive Management Team (not costed).

Culture North West (Regional Cultural Consortium)	Arts Council England, North West to share the findings of the Report with Culture Northwest Executive Team, to inform its input into, e.g. the national Creative Economy Programme, and to post the Report with the region's Cultural Observatory.
Other stakeholders	A range of dissemination methods should be considered in order for the report to reach a larger audience. In particular other stakeholders such as the consultees, the CIPs, the key drivers consultees, Creative Industries Forum North West and the wider north west music sector. These include the full report being available on Arts Council England, North West's website with an email sent to all stakeholders with the full report and/or a short digest of the report prepared by BOP (optional) to be sent to key individuals and organisations. This should include clear and agreed next steps.

2. Review of sector development tools and support mechanisms piloted and developed by Manchester City Music Network (MC:MN) and the Music Development Agency (MDA)

There are examples of tools and services developed by MC:MN and MDA that warrant further detailed assessment to ensure that the learning from these music development agencies is captured, and that good practice is retained and built upon. This is an imperative as the current phase of European Structural Funds, which has substantially funded both agencies, is coming to an end in 2007. Funding for MC:MN has been suspended. Where programmes and initiatives have clear advantages in being used more widely, the management of these requires careful coordination including opportunities to contract services from existing providers.

MC:MN projects and services included advice arranged in the form of one-to-one appointments with music business advisors, information services, mentoring and Master Classes, which were provided by MMF training.

MDA works in partnership to deliver Creative Bias Creative Advantage for the creative industries in Merseyside, with the music as a priority growth sector, to bring together business health checks, training needs analysis, skills development, incubation services, mentoring, knowledge transfer, seminars and networking events. Further projects include a proposal for the development of MDA PIMS (Project Information Management System), a range of initiatives to encourage industry networking, exploitation of digital communications, access to resources/advice and international trade opportunities and working collaboratively with other specialist intermediary organisations, mainstream business support providers and the music industry.

Tasks to be undertaken:

Evaluation framework and assessment criteria established - based upon the provision of services for the music sector identified in this Report.
Identify and review specialist tools and support mechanisms developed by MC:MN and MDA.
Analysis of tools and mechanisms , particularly those that are likely to have sustained impact in the medium and long term to assess fitness of purpose against need identified in this Report, gaps in provision and where existing tools could be enhanced.
Produce a report that will help to shape the Music Driver .

This work is being costed separately for Arts Council England, North West.

3. Design and implementation of the Music Driver

Once agreement to the principles in this report is secured, there are a range of tasks that need to be undertaken to design and implement its recommendations. Chief of these is examining the needs and opportunities that should be addressed by the Music Driver which will determine appropriate roles and functions which in turn will scope the structural options. Essentially, this will **result in the production of a business plan** that will include:

Designing business development activity (see 2 above plus additional bespoke design).
Identifying funders and funding streams , to include the joint approach to support of the sector by ACE, NW and NWDA.
Assessing its relationship with the other regional/sub-regional local and deliverers and positioning within the networks.
Producing a cost benefit analysis – this will outline how the Music Driver will meet their objectives/contribute to their business.
Recommending a management and advisory structure and agree duration .
Designing a recruitment/contracting process.
Produce Final Report .

This work is being costed separately for Arts Council England, North West.

4. Higher and Further Education

Research for this Report found that current funding streams do not encourage a systematic joined up approach between HE/FE and the music industry. HE/FE is, however, a key 'planet' in the future development of the sector with several examples of industry relevant practice being developed by HEIs in the region. There is an opportunity to examine how to connect and disseminate innovations in HE/FE and the music industry better, and indeed between HEIs, and how to make facilities more accessible to the wider music industry.

It is recommended that Arts Council England, North West should consider piloting two pieces of action research with a small number of HEIs and colleges in the north west to:

<p>Improve connectivity between existing HE/FE practice and the wider music industry.</p>
<p>Examine how HE/FE facilities could be made more accessible to the wider music industry (this could be considered, for example, in terms of the new University for Cumbria).</p>

The design and delivery of these two pieces of action research is not costed.

7 Appendix

7.1 Steering Group Membership

Name	Organisation
Deborah Best	Creative Industries Officer, Arts Council England, North West
Eddie Thomas	Music Officer, Arts Council England, North West
Gary McClarnan	Vice Chair, Music Managers Forum, Founder and CEO, Sparklestreet
Howard Raynor	Managing Director, World Class Service Ltd.
Peter Mearns	Director of Marketing, Northwest Regional Development Agency

7.2 Key Drivers Consultation

Meeting on 14 June 2006

Name	Organisation
Ann Munro	Manchester City Music Network (MC:MN)
Cathy Skelly	Merseyside ACME
Eddie Thomas	Arts Council England, North West
Gary McClarnan	Vice Chair MMF and Founder and CEO, Sparklestreet
Iain Bennett	Creative Lancashire
Katie Wise	Cultural Business Venture Cumbria
Lyn Barbour	CIDs
Peter Fulwell	Music Development Agency

7.3 Consultation List

Name	Organisation
Consultees: north west	
Ailís Ní Ríain	Arts Council England, North West
Alex Green	ALLFM96.9
Alison Surtees	Manchester Digital Music Archive (MDMA)
Andy Lovatt	Northwest Regional Development Agency
Caroline Elleray	BMG
Colin Sinclair	MIDAS
CP Lee	Salford University
Dave Carter	MDDA (Manchester Digital Development Association)
Denise Proctor	Noise Festival
Dolan Hewison	GMMAZ - Greater Manchester Music Action Zone
Eddie Thomas	Arts Council England, North West

Elaine Rogers	Musicians Union
Gary McClarnan	Vice Chair MMF and Founder and CEO, Sparklestreet
Howard Raynor	World Class Service Ltd.
Iain Bennett	Creative Lancashire
Ian Croal	Band on the Wall
Jay Taylor	Night & Day
Jennifer John	Parr Street Studios
Jeremy Davies	Root Music
John Kinsella	Creative Cumbria
Justin O'Connor	Manchester Institute of Popular Culture
Kevin McManus	Merseyside Arts, Culture and Media Enterprise
Lesley Lomax	MIDAS
Liam Walsh	Red Alert
Lisa Harding	Cheshire and Warrington Creative Industries
Liz Lacey	Liverpool Centre for Arts Development
Lyn Barbour	CIDS
Maggie Clarke	x.trax
Martin Isherwood	Liverpool Institute for Performing Arts
Mike Jones	Liverpool University: Institute of Popular Music
Pete Fulwell	Music Development Agency
Peter Jenkinson	Music is Ours
Peter Mearns	Northwest Regional Development Agency
Phil Ellis	City College Manchester
Rachel Wood	Woodwork Music
Ruth Daniels	Fat Northerner Records
Professor Sheila Whiteley	Salford University
Stef Loukes	Unsigned Guide
Stephen Lea	Lea & Co
Stuart Worthington	MC:MN
Suhail Khan	Artist/Film maker
Toby Smith	Royal Northern College of Music
Tom Clarke	Noise Festival
Tony Wilson	In The City
Wes Wilkie	MZONE - Liverpool and Mersey Music Action Zone
Consultees: other regions, national	
Al Tickel	Creative and Cultural Skills
Alan James	Arts Council England
Andrew McKenzie	Arts Council England, London
David Francis	Arts Council England
Jim Mawdsley	Generator
Jonathan Robinson	MusicTank
Paul Brindley	MusicAlly
Paul Burns	Studio 64/From Teesside with Love
Phil Patterson	UKTI
Simon Frith	University of Edinburgh

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Amplifier www.amplifier.org.uk

CumBrio www.cumbrio.com

CIDS <http://www.cids.co.uk/>

Dutch Rock and Pop Institute (NPI) www.hollandrocks.com

Factor, Canada www.factor.ca

Federation of Music Collectives, Ireland www.fmc-ireland.com

The French Music Bureau http://www.french-music.org/tpl_home_london.php

Generator www.generator.org.uk

MC:MN www.manchester-music.org.uk

Merseyside ACME <http://www.merseysideacme.com>

Motive Sounds www.motivesounds.co.uk

Music Export Finland www.musex.fi

MusicLeader NW www.musicleader.net

ROSA – The Danish Rock Council www.rosa.org

SxSW (South by Southwest) <http://2005.sxsw.com/music/>

Welsh Music Foundation www.welshmusicfoundation.com

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