

Agenda – Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu

Lleoliad:	I gael rhagor o wybodaeth cysylltwch a:
Ystafell Bwyllgora 2 – Y Senedd	Martha Da Gama Howells
Dyddiad: Dydd Mercher, 16 Hydref 2019	Clerc y Pwyllgor 0300 200 6565
Amser: 09.30	SeneddDGCh@cynulliad.cymru

1 Cyflwyniad, ymddiheuriadau, dirprwyon a datgan buddiannau

(09.30)

Dogfennau atodol:

2 Ymchwiliad y gerddoriaeth fyw yng Nghymru: UK Music ac Undeb y Cerddorion

(09.30–10.30)

(Tudalennau 1 – 28)

Tom Kiehl, Dirprwy Brif Swyddog Gweithredol a Chyfarwyddwr Materion

Cyhoeddus, UK Music

Dr Sam Murray, Swyddog Ymchwil a Pholisi, UK Music

Andy Warnock, Trefnydd Rhanbarthol, Cymru a De-Orllewin Lloegr, Undeb y Cerddorion

Phil Kear, Ysgrifennydd Cyffredinol Cynorthwyol, Undeb y Cerddorion

Dogfennau atodol:

Briff Ymchwil

UK Music

Undeb y Cerddorion

3 Ymchwiliad y gerddoriaeth fyw yng Nghymru: Llywodraeth Leol

(10.30–11.30)

(Tudalennau 29 – 36)

Y Cynghorydd Huw Thomas, Arweinydd Cyngor Caerdydd

Ruth Cayford, Rheolwr Diwydiannau Creadigol a Diwylliant

Jon Day, Pennaeth Polisi Economaidd, Cyngor Caerdydd



Dogfennau atodol:

Cyngor Caerdydd

Argymhellion Adroddiad Dinas Gerdd Sound Diplomacy

Crynodeb Adroddiad Dinas Gerdd Sound Diplomacy

4 Cynnig o dan Reol Sefydlog 17.42(vi) i benderfynu gwahardd y cyhoedd o weddill y cyfarfodi

Dogfennau atodol:

5 Ôl-drafodaeth breifat

(11.30 – 12.00)

Dogfennau atodol:

Mae cyfyngiadau ar y ddogfen hon

Music Industry in Wales

Culture, Welsh Language and Communications Committee

1. UK Music is the umbrella body representing the collective interests of the UK's commercial music industry, from songwriters and composers to artists and musicians, studio producers, music managers, music publishers, major and independent record labels, music licensing companies and the live music sector.
2. UK Music exists to represent the UK's commercial music sector, to drive economic growth and promote the benefits of music to British society. A full list of UK Music members can be found in annex.
3. In the latest edition of our Measuring Music ¹ report our research found that the UK Music Industry contributes £4.5 billion GVA to the UK Economy. The music industry also generated £2.6 billion in export revenues. Live music contributes £991m GVA to the economy and generated £80 million in export revenues. The UK Music Industry employs 145,815 people, with 28,659 of these employees being based in the Live sector.

Grassroots Music Venues

4. UK Music was supportive of the Save Womanby Street campaign in 2017 working closely with Kevin Brennan MP and Jo Stevens MP on exploring what policy could help save this area of cultural significance due to the number of venues on the street. We have continued our work with Kevin and Jo in advocating for the protection of Welsh grassroots music venues in the Houses of Parliament alongside our partners the Music Venue Trust.
5. Grassroots music venues are often the first step onto the talent pipeline for emerging musicians. They provide vital opportunities to undertake first performances in front of an audience, meaning the musician can develop their songs via audience feedback and such gigs offer the first professional payments. It is with this in mind UK Music would like to see the exploration of specific business rate relief for music venues acknowledging their role in communities and career development.
6. Over the past decade there has been a 35 per cent decline in the total number of grassroots music venues in the UK. These closures have mainly been due to the increasing financial pressure faced by venue managers as a result of overhead costs, bill, rent and business rates, or due to planning disputes around noise.
7. The Music Venue Trust report that the cost of delivering live music events last year rose by 4 per cent in grassroots music venues and amounts to 130 per cent of total gross

¹ https://www.ukmusic.org/assets/general/UK_Music_Measuring_Music_2018.pdf

tickets receipts. This is directly attributable to business rates increases.

8. As a result of the 2017 revaluation of rateable values business rates have increased for many Grassroots Music Venues across Wales. They remain a concerning issue for many venue managers. The increase of the business rate multiplier has also had a marked effect with business rates rising. In 2018 Buffalo bar in Cardiff closed citing business rates as a reason. According to our calculations Buffalo's business rates increased by 59% following the 2017 revaluation meaning they had an annual bill of nearly £60,000 for business rates alone.
9. High Street and Retail Rates Relief in Wales currently applies to bars, pubs and ticket office but guidance is unclear as to whether grassroots music venues are eligible. In a communication received from the Local Government Strategic Finance Division of the Welsh Government we were informed that: "it is for local authorities to decide in each individual case when to grant relief for this scheme and music venues will need to contact their billing authority to determine eligibility". Such localised discretion creates what amounts to a postcode lottery where some areas will grant music venues this discount and others will not.
10. A positive change would be to introduce Grassroots Music Venues as an eligible hereditament for this relief, this simple change would create much needed clarity on the eligibility of music venues. In England the government has implemented a policy which we view as discriminatory as it explicitly excludes music venues, stating without explanation that they should not receive High Street Rate Relief. Thus Wales should grasp this opportunity to take the lead and demonstrate proactive support of Grassroot Music Venues.
11. UK Music notes the 2017 introduction of the Agent of Change principle into the Welsh national planning policy, a decision welcomed by our members. We wish to ensure the principle is implemented properly with clear guidance setting out the standards developers should meet in the planning process and closing potential loopholes they may exploit. One consistent issue we have found has been developers conducting sound surveys at inappropriate times of day to quantify their efforts as agents of change in mitigating the impact of noise. Issues like these should be proactively targeted in clear guidance to local authorities, who in turn should implement the principle with clarity and certainty.
12. Wales has many areas of musical significance, often under threat of residential development typified in 2017 by the threat to Womanby St, a street full of music venues threatened by residential and hotel developments. Cultural Zoning is a tool that governments can use to ensure that areas of cultural significance are protected, and that unsuitable developments cannot occur and pose a risk to the musical heritage of a street or quarter.
13. Many venues rent the properties they operate which can cause an issue when ownership of the property changes hands, or when owners see new opportunities for the space. Venues which rent in the first instance are often subjected to increases and service charges. Owners can also remove a tenant to change use of the space. For example, in the case of the Cardiff venue Gwdihw, the property owner wanted to demolish the property. The Welsh Government should explore how venues can be taken into community ownership if they can demonstrate a cultural significance to communities.

14. With many grassroots venues having closed across Wales, the Welsh government could look at supporting new venues to open. This support could take a variety of forms including helping find suitable spaces for venues, clear guidance on opening venues from a regulatory perspective, and finding fiscal measures which could support new spaces.
15. There are many venues and arts centres in Wales which are supported by local authorities. They are facing significant cuts as a result of wider local service cuts leading to some facing potential closure. This also reduces the amount of live music being programmed as most centres are not in a financial position to take risks when making bookings to allow their sustainability of venues. Often tribute bands will be booked before emerging talent, which impacts the live music ecosystem.
16. UK Music notes the recent *Cardiff: Music Ecosystem Study and Strategic Recommendations report*² published by Sound Diplomacy earlier this year. We welcome the report's recommendations and would welcome their introduction not only in Cardiff but to be explored on a national level.

Music Talent Development

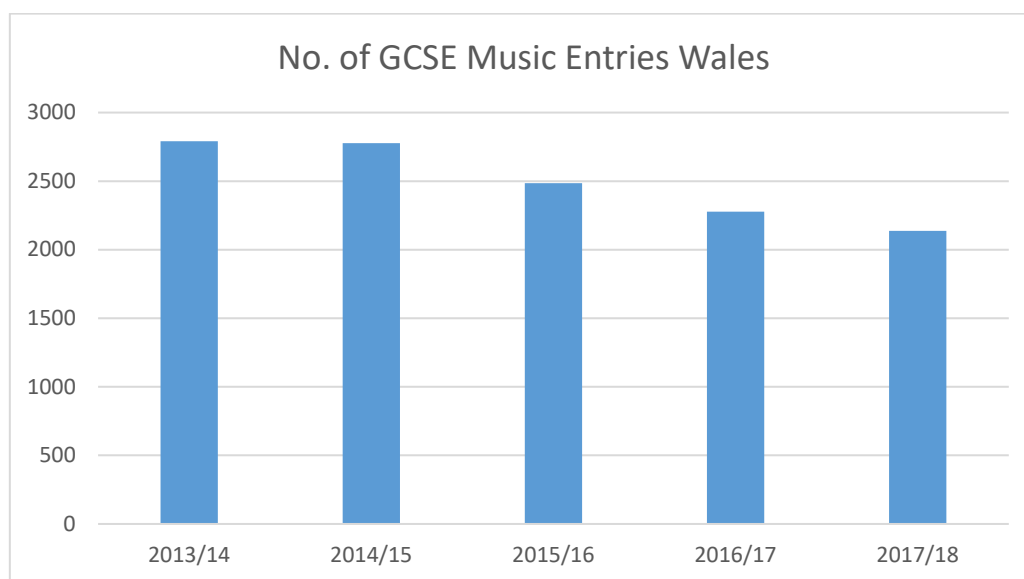
17. UK Music have been supportive of talent development activity in Wales such as the Focus Wales Festival in Wrexham which we attended and supported on the invitation of Ian Lucas MP who has been a great advocate of the festival. The festival invites international artists to showcase, and the countries they are from return the favour and host Welsh artists. It also offers a wide variety of support and information to emerging talent in Wales and gives new bands a stage and audience to connect with. For our response we consulted with Neale Thompson from Focus Wales particularly on what support is needed for emerging musical talent.
18. UK Music supports the good work of Arts Council Wales and their various talent development programmes. We note the successful Horizons/Gorwelion programme run in partnership with BBC Cymru which selects 12 artists and offers a specific talent development programme. The artists on the programme are offered opportunities to play at a number of festivals and record radio sessions.
19. UK Music welcomes developments made in music education provision in Wales and the moves to begin addressing issues surrounding the music industry talent pipeline. We note the Culture, Welsh Language and Communications Committee's *Hitting the Right Inquiry into funding for and access to music education* report³ which called for reforms of music education in Wales. We welcome the national music endowment *Anthem* fund and hope it will enable children, regardless of background, to access music education.
20. UK Music's 2018 Talent Pipeline report found that 17 per cent of music creators were educated at fee paying schools, compared with 7 per cent across the population as a whole. 46 per cent of music creators receive financial help from family and friends at some point in

²<http://cardiff.moderngov.co.uk/documents/s29332/Cabinet%2018%20April%202019%20Music%20Ecosystem%20study%20App%201.pdf>

³ <http://www.assembly.wales/laid%20documents/cr-ld11595/cr-ld11595-e.pdf>

the development on their professional career. We also note that the Cultural Learning Alliance report that participation in structured arts activities can increase cognitive abilities by 17 per cent.

21. UK Music believes it is important to ensure that careers advice and music education opens the whole music industry up to young people, making sure they are aware of the wide variety of career paths outside of creating and performing.
22. UK Music research into the number of Music GCSE Entries found that there has been a decrease of nearly 24 per cent between 2013/14 and 2017/18 in the number of entries taking GCSE music in Wales. This has an impact on the live sector pipeline of performing and technical talent, and it is important that the reasons for such a decline are explored.



23. UK Music supports 23 rehearsal spaces in urban and rural areas across the UK including spaces in the Ebbw Vale Institute and Aberystwyth Arts Centre. Each space provides instruments and equipment for young people to use and play with for free or for minimal cost. Such spaces prove vital to talent development and ensuring equality of access to such resources. UK Music would be keen to engage with the Welsh Government to seek the possibility of establishing a Wales-wide rehearsal space scheme.
24. We are aware the Welsh government has commissioned research into music venues in Wales and we feel a crucial part of this should investigate the journey which artists go on between venues as their talent develops. This would allow an understanding of career progression, in an as yet to be explored detailed way and would enable the identification of opportunities, risks, and challenges in such development. Gaps in support provision for emerging talent should be identified and dialogue should happen to work out how government and industry could address them.

Transport

25. Music making in Wales is impacted by the lack of transport connectivity across Wales dividing the north and south of the country. To travel north journey times are increased by having to go through England. This lack of connectivity has created disparate music scenes

which rely on different urban centres. Whilst Cardiff has developed successfully as a music city for musicians in central South Wales to access, those in North Wales generally must travel to Manchester or Liverpool to progress their careers.

26. UK Music welcomes the proposals for a South Wales Metro system connecting urban centres with rural areas. Live music events are often affected by transport infrastructure and it is important to maintain not only connections between the rural and urban but also ensure that transport runs late enough so that people can get home after gigs. By connecting areas around Newport, Swansea and Cardiff to city centres there can also be opportunity for performance in rural areas and to create a South Wales touring circuit.
27. UK Music notes the Noson Allan/Night Out programme run by Arts Council Wales which enables the risk to be taken out of gigs in rural areas and hosted in venues such as community centres. This has allowed communities in rural areas to experience performances they would normally have to travel miles to see and tackles cultural isolation successfully. This programme enables the creation of a rural touring circuit.

Brexit

28. Whilst we recognise the Welsh Assembly has limited devolved powers to deal with Brexit, we wanted to make the committee aware of the effect of Brexit on live music in Wales.
29. The Brexit process is of great concern to the UK music industry. Freedom of movement is invaluable for touring performers and crew. UK Music supports the continuation of freedom of movement. Currently freedom of movement will be coming to an end when the UK leaves the EU. The current negotiations in the event of “no deal” are for a reciprocal visa-free arrangement for visits up to 3 months.
30. Wales has a long tradition of inviting performers from Europe to play at festivals, venues and Eisteddfods across Wales. We would encourage Wales to remain open to performers from across Europe after Brexit and seek ways to ensure such cultural exchange can still take place. Such positive treatment would likely be reciprocated for Welsh artists enabling them to continue touring across Europe.
31. We are also concerned about the introduction of Carnets on touring instruments and equipment. Carnets are customs documents which log goods to enable them to clear customs and avoid customs charges. European Commission Brexit preparedness notices indicate an intention to introduce carnets for movement of goods in the event of a no-deal Brexit. UK Music continues to encourage the government to avoid such restrictions being placed on touring goods, as this would create long delays at border crossing points for tours. We also believe they will impact the lower end of the music market presenting a threat to newer acts trying to build an audience. Digital platforms like Spotify have allowed music to be distributed globally but the impact of carnets may mean a Welsh band that has gained a following in Spain cannot tour there.

Music Tourism

32. In 2017 we conducted research⁴ exploring music tourism's economic impact and found it contributed £4 billion to the UK Economy. In 2017 29.1 million people attended live music events across the UK, from which 810,314 people were overseas music tourists and 10.1 million people were domestic tourists. In 2017 music tourism alone sustained 44,896 jobs across the UK.
33. Wales has a variety of events successfully attracting music tourists to the country, but it needs a coherent strategy to address the growth potential of it across Wales. It needs to be explored if Wales can articulate a music heritage through tourism or whether this would be more experiential. A strategy would be able to explore measures that would lead to tourist growth and would also benefit other industries such as the hospitality sector.

Viability of Traditional Welsh Music Scene

34. UK Music sees the promotion of Welsh language music as essential to ensuring that Wales' unique cultural identity is preserved. There have been many recent successes in Welsh language music. For example, the band Alffa released the song 'Gwenwyn' which became the first Welsh language song to have over a million plays on Spotify and singer Gwenno's Welsh and Cornish record 'Y Dydd Olaf' received critical acclaim winning the Welsh Music Prize. The Welsh Government should continue its support for Welsh language music and consider ways to explore its export potential by helping fund appearances at international showcases.
35. UK Music notes the successful PYST Cyfyngedig programme funded by the Welsh Government which provides distribution and label services for labels and artists in Wales. This has resulted in over 5.2 million streams of Welsh language artists providing a platform they didn't previously have. We support the continuation and development of this project and hope to see an English language equivalent set up, acknowledging the importance of providing bespoke support for music in the Welsh Language.

Festival Sector

36. UK Music welcomes the continuing exemption from business rates for agricultural land. Many festivals take place on agricultural land and as a result often make large contributions to local rural economies despite only operating for one weekend a year.
37. Green Man Festival for example generates 1,500 direct jobs on site; £500,000 additional economic impact (gross value added) beyond the festival site; £250,000 of funding raised for charities since 2010; and runs training programs with Merthyr Tydfil College and the Salvation Army in Cardiff to train and mentor vulnerable young adults⁵.
38. Continuing the agricultural exemption means that festivals are not inhibited by landowners making them pay the total non-domestic rates as has happened in England. The

⁴ https://www.ukmusic.org/assets/general/Live_Music.pdf

⁵ <https://www.local.gov.uk/green-man-festival-powys>

continuation of a historical agricultural exemption in practice for landowners hosting festivals is crucial to the Welsh music festival industry.

39. It is crucial that the next generation of festival talent is developed from emerging artists, to festival producers, engineers, promoters and technicians to continue the success of Wales' festivals. Creative careers in the industry surrounding music should be promoted and supported to enable the development of this talent.
40. Festivals are a vital part of the Welsh Music industry and their continued growth will allow people in Wales and music tourists to the region to have new experiences and discover new talent. We note the current Arts Council Wales festival support offer. The Welsh Government could look at ways to support the creation of new music festivals on a variety of scales, this could be aided by clear direct advice as to regulatory compliance required.

Live Music Strategy

41. It is clear that whilst there are many welcome initiatives from Arts Council Wales and Welsh Government there is currently no coordinated music industry strategy which brings together various programmes around strategic goals. UK Music would be supportive of the creation of a wide-reaching music industry strategy for Wales.

Annex

UK Music's membership comprises: -

- AIM – The Association of Independent Music – the trade body for the independent music community, representing over 850 small and medium sized independent record labels and associated music businesses.
- BPI - the trade body of the recorded music industry representing 3 major record labels and over 300 independent record labels.
- FAC – The Featured Artists Coalition represents and promotes the interests of featured recording artists in the music industry.
- The Ivors Academy - The Ivors Academy exists to support, protect and celebrate music creators in the UK. We are the independent professional association representing songwriters and composers in all genres, whether they create song, symphony or sync. Previously known as BASCA, we can trace our history back over 70 years. As champions of music creators, we have three main activities: campaigning, cultivating and celebrating.
- MMF – Music Managers Forum - representing over 650 UK managers of artists, songwriters and producers across the music industry with global businesses.
- MPG - Music Producers Guild - representing and promoting the interests of all those involved in the production of recorded music – including producers, engineers, mixers, re-mixers, programmers and mastering engineers.

- MPA - Music Publishers Association - with 260 major and independent music publishers in membership, representing close to 4,000 catalogues across all genres of music.
- Musicians' Union representing 30,000 musicians.
- PPL is the music licensing company which works on behalf of over 100,000 record companies and performers to license recorded music played in public (at pubs, nightclubs, restaurants, shops, offices and many other business types) and broadcast (TV and radio) in the UK.
- *PRS for Music* is responsible for the collective licensing of rights in the musical works of 114,000 composers, songwriters and publishers and an international repertoire of 10 million songs.
- UK Live Music Group, representing the main trade associations and representative bodies of the live music sector

For more information please contact Sam Murray, Policy & Research Officer, UK Music on [REDACTED] or [REDACTED]

Consultation: Music Industry in Wales, Live Music (June 2019)

1. The Musicians' Union (MU) is the trade union for musicians in the UK, and represents over 31,000 employed and self-employed musicians working in every area of the UK music industry, and in music education.
2. Live performance is a crucial part of our members' work and income across all genres of music, through functions, gigs, festivals, theatre productions, concerts, busking, session work, broadcasts, and the royalties that songwriters and composers receive from live performances of their music. We are committed to supporting live music in our work, through the UK-wide Live Performance, Theatre, and Orchestra sections, the MU's six Regional offices, and our campaigns such as Keep Music Live and Work Not Play.
3. The MU supports fair pay and conditions for live work through collective bargaining as well as promulgated rates, template contracts, and legal advice for our members. We also support venues and musicians through our Fair Play Venue scheme, which invites venues to declare their support for the fair treatment of musicians and opposition to unfair deals such as pay-to-play by endorsing the principles of our Fair Play Guide.
4. We have supported recent campaigns to protect live music venues in Wales, such as the Save Womanby Street campaign in 2017 and the Save Gwdihw and Guildford Crescent campaign in 2018/19. On a UK-wide level the MU has recently worked in partnership with organisations like UK Music and the Music Venue Trust to advocate for grassroots music venues and for venues to be protected by the Agent of Change principle.
5. Live music is a vital part of cultural life and the economy in Wales and across the UK, and therefore needs to be properly valued, supported, and protected. According to UK Music's Measuring Music 2018 report, live music contributed around £991m in Gross Value Added (GVA) to the UK economy in 2017.
6. The MU is a member of UK Music, among other industry bodies, and we support UK Music's response to this consultation, while also making the following additional points.

Support for live music

7. All forms of live music should be supported in Wales, including Welsh language and traditional music, at all levels, from grassroots venues to shows at the Principality Stadium, while Welsh Government, Arts Council of Wales (ACW), and local authority activity and policies can have a significant effect on the health and availability of live music in Wales.
8. Some areas of live music, such as classical music and opera, are generally more reliant on public funding and therefore more likely to be seriously and directly affected by changes in ACW policies. On the other hand, grassroots music venues, and therefore emerging artists, are typically more dependent on government and local authority activity and policies on issues like planning, licensing, and business rates. Wider policies, such as parking and transport, can also have a significant impact on music and the broader night-time economy.
9. We welcome the Welsh Government's ongoing work on researching and mapping grassroots music venues in Wales, as well as establishing Creative Wales, and call on Welsh Government to create a coordinated, wide-reaching music industry strategy for Wales encompassing the work of Creative Wales and ACW.
10. We have welcomed the recent announcement that Arts Council England have created Supporting Grassroots Live Music, a new strand within their National Lottery Project Grants programme with a ring-fenced budget. We call on Welsh Government to explore how best to provide support and funding for existing and new venues, particularly in relation to grassroots music venues and options for taking live music venues into community ownership, without stretching the ACW budget further.
11. We note Cardiff Council's work on a music strategy for Cardiff following the recent report by Sound Diplomacy *Cardiff: Music Ecosystem Study and Strategic Recommendations* and would urge other local authorities in Wales to carry out similar work and draw up strategies in relation to music, particularly live music and venues, that account for the economic and cultural value of music, as well as the need for a good talent development pipeline in Wales serviced by the necessary venues.

Musicians' pay and conditions; talent development

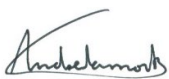
12. We are concerned about low pay and bad practices that are still common when musicians are engaged for live work across Wales. We therefore call on Welsh Government, ACW, Creative Wales, and other industry bodies to support and encourage best practice and good rates of pay in the music industry at every opportunity, particularly when providing support and funding.
13. The MU is extremely concerned about the impact of Brexit on musicians' work and the state of the UK music industry, particularly in relation to live music. The ability to travel and work freely and easily in the EU is of paramount importance to our members, so we support the continuation of freedom of movement or, at the very

least, a simple, cheap, and admin-light EU touring visa for musicians and performers. The end of freedom of movement and the introduction of customs checks and carnets would make touring more difficult and expensive for all musicians, but particularly new and emerging artists, and would also have an impact on the ability of musicians from the EU to come to Wales. That would, in turn, have an impact on live music in Wales, including venues and work opportunities for Welsh musicians. While we recognise that Brexit is not a devolved issue, we welcome the Welsh Government's recent decision to support a referendum with remain on the ballot paper and to campaign to remain in the EU.

14. We remain concerned about music education provision in Wales, which is essential for the long-term health of live music. We welcome the Culture, Welsh Language, and Communications Committee's recent work in this area, as well as Welsh Government's work on commissioning a feasibility study into the options for delivery of music services and the creation of a national plan for music education.
15. We welcome Welsh Government's initial £1m investment in *Anthem* and ACW's work on developing it since then, and hope that it can develop into a valuable resource for music in Wales, but are concerned about the extent to which it will be possible to develop an endowment from private funding and the potential impact funding from *Anthem* will have compared to ongoing, direct funding from Welsh Government.

Other issues

16. We note that some local authorities in Wales haven't been fully supportive of busking, which is a missed opportunity given that live music can enhance the atmosphere of an area, especially when supported with the right guidance. We have helped several local authorities across the UK to develop busking guides that include best practice for buskers, council officers, residents, and businesses and would be happy to work with all local authorities in Wales on similar guidance.



Andy Warnock
Regional Organiser, Wales and South West England
Musicians' Union



CABINET MEETING: 10 OCTOBER 2019

MUSIC STRATEGY UPDATE

CULTURE & LEISURE (COUNCILLOR PETER BRADBURY)

AGENDA ITEM: 5

Appendix 5 of this report is not for publication as it contains exempt information of the description contained in paragraphs 14 and 21 of Schedule 12A of the Local Government Act 1972.

Reason for this Report

1. To obtain Cabinet authority to establish a new Music Board for the city in response to the recommendation outlined in the Sound Diplomacy report.

Background

2. Capital Ambition recognises the city's "cultural offer is an area of competitive advantage and its cultural and leisure infrastructure is recognised by its citizens as amongst the best in Europe". This approach recognises and builds on the success of the past two decades where culture and sport have been inventively used to transform the city. Subsequently, the city's Economic Strategy, approved by Cabinet in April 2019, identified the creative industries as a key part of the city's industrial strategy.
3. In developing the city's economic strategy, music was identified as a strength and opportunity within the creative sector. Cardiff is responsible for approximately 30% of the production and 41% of the jobs generated by the core of the Welsh music sector. It generated an output of £153 million, and added £104 million value (GVA) to the local economy in 2016. To make the most of Cardiff's potential, however, there is a need to assess, review, measure and analyse the strengths and deficiencies of Cardiff's cultural assets and infrastructure.
4. To that end the Economic Strategy identified '*Delivering a Music Strategy for Cardiff*' as a key priority. To progress this work, Sound Diplomacy - a global leader of the Music Cities movement – were appointed to analyse Cardiff's music ecosystem to inform the development of a Music Strategy for the city.

5. The Cardiff Music Ecosystem Study (attached as Appendix 1), produced by Sound Diplomacy, was presented to the Cabinet Meeting on 18 April 2019 where it was resolved that the contents of the report be noted, and that a future report be brought to Cabinet to:
 - Provide a detailed response to the Music Ecosystem Study and Strategic Recommendations; and
 - Establish a Music Board, taking into consideration the recommendations of the Sound Diplomacy Music Strategy Report and including detail of the governance arrangements and the Board's Terms of Reference.
6. This report outlines that response, and in particular seeks approval for the Terms of Reference for the Music Board and to approve the proposed appointments to the Board.

Sound Diplomacy Music City Report - Informing a Music Strategy for Cardiff: Music Ecosystem Study and Strategic Recommendations

7. The Cardiff Music Ecosystem Study, attached as Appendix 1, analysed Cardiff's music ecosystem to identify the most effective way to use music to promote the city. This research considered a series of issues that have the potential to support the local music industry, generate economic impact and improve the quality of life of those who live in, visit or choose to study in the city. These include:
 - Governance and Leadership;
 - Licensing & Police;
 - Spaces and Places;
 - Planning;
 - Transport;
 - Education;
 - Employment & Skills;
 - Tourism & Branding.
8. The April 2019 Cabinet Report noted that the Council intends to develop a Music Strategy Work Programme to progress the recommendations of the Sound Diplomacy Report. It is considered that, should it be established, the proposed Music Board would be the most appropriate delivery body for overseeing the implementation of the Report recommendations.

Establishing a Music Board

9. The Sound Diplomacy report noted that "there's no existing network or forum through which music venues or music professional organisations meet in Cardiff (or in Wales). The take-home from the Cardiff Music Roundtables, and work done by Independent Venue Week in Wales, demonstrated how valuable facilitated opportunities were for these venues to meet to discuss their work, trends, issues and ideas."

10. The report proposed that governance should be established to address these issues that will:
 - Create a leading representative body formed by a wide range of people with proven leadership ability and influence within the music ecosystem;
 - Provide an advisory board to help establish, promote and maintain the city as a music friendly city;
 - Connect with other cities to share best practice, and for information and talent exchange;
 - Advocate for the sustainability of the music sector in the city, including the affordability of living and working spaces;
 - Support the development of music activity in the city;
 - Collaborate with South Wales Police and the Public Service Board to maintain a safe music ecosystem;
 - Lobby the Welsh Government to increase support for the music sector.
11. Subsequently the Sound Diplomacy report recommended the establishment of the Music Board to act “as a platform that enables better communication between a city’s governing body and its music ecosystem”.
12. A draft Terms of Reference for the Board, developed in conjunction with Sound Diplomacy, has been established that is attached as Appendix 3.
13. The draft Terms of Reference notes the mission of the Cardiff Music Board as being “to champion Cardiff’s music scene, protect and promote music at grassroots level and provide a platform for increased communication and collaboration across the sector”.
14. The draft Terms of Reference notes the objectives of the Board as being to:
 - Promote the development of and champion Cardiff’s music scene;
 - Lobby for investment in Cardiff’s music scene;
 - Promote fairness, access and diversity in Cardiff’s music scene and champion diversity initiatives;
 - Support a partnership approach to the development of Cardiff’s music scene;
 - Explore ways to increase the resilience and sustainability of grassroots music sector and venues;
 - Support developers and communities to protect existing music spaces and develop new music venues and workspaces.
15. The administration and secretariat function of the Board will be provided by Cardiff Council. Membership of the Board is voluntary. Members cannot claim expenses and are not paid to attend board meetings, provide advice and comment, represent the board or undertake any other activity related to the work of the Board. The costs associated with administering the Board will be met from within existing Council Economic Development resources.

16. The Music Board will act in a purely advisory manner, with the aim of both influencing public sector intervention and support, but also with the aim of aligning private sector investment. It should be noted therefore that the Board is not an executive body, and does not have the authority to:
 - Expend money on behalf of Cardiff Council;
 - Commit or influence Cardiff Council to any arrangement;
 - Consider any matter outside its specific Terms of Reference;
 - Direct Cardiff Council staff in the performance of their duties and shall not seek to do so;
 - Or purport or represent Cardiff Council in any communication with the public or media.
17. The Board will, however, be responsible for developing the Cardiff Music Strategy, which will include:
 - A strategy and subsequent programme of activities that deliver the objectives of the Board;
 - Identifying resources for delivering the strategy;
 - Promoting the sector;
 - Lobbying for investment in the sector.
18. To establish the Board an open invitation for Board Members was issued in August 2019 seeking applications. The advertisement and the criteria for appointing Board Members is attached as Appendix 4.
19. Following the advertisement 50 applications were received and assessed by Cardiff Council officials and Sound Diplomacy. The proposed composition is established as Confidential Appendix 5. Should the Cabinet approve the Terms of Reference and proposed composition of the Board successful candidates will be notified.

Response to the Recommendations of the Sound Diplomacy Music Strategy Report

20. As noted in paragraph 5, at the Cabinet Meeting of 18 April 2019 it was resolved that a future report be brought to Cabinet to provide a detailed response to the Music Ecosystem Study and Strategic Recommendations.
21. This report outlines the Council's initial response to the recommendations, which is attached as Appendix 2. It should be noted that some elements of consideration will be deferred for consideration by the Music Board, should its establishment be approved. This will allow for a wider consideration by the sector of the recommendations, and to enable the delivery of the Music Strategy as outlined in paragraph 18 above.

Signature Event

22. The Sound Diplomacy study recommended the creation of a cross-genre international artist showcase and signature event. In particular, it notes:

“An artist showcase event is a great opportunity to market Cardiff as a city filled with talent, whilst providing artists a platform with which to build international recognition.”

23. It has for some time been considered that establishing a regular home-grown event would be a major addition to Cardiff’s event portfolio. Subsequently the Council has been working with Welsh Government and private sector partners to develop proposals for a new signature event. It is intended that the event would take the form of an internationally relevant music festival, as well as providing an opportunity to develop the sector within Cardiff through show-casing and industry events. The proposed key objectives of such an event would be to:

- Provide a two-week period to host a range of music events;
- Establish a regular event that attracts international audiences;
- Establish a respected event for industry;
- Establish an event that showcases new talent, and promotes Cardiff and Wales as a leading destination for music tourism;
- Provides a legacy for the music industry in Cardiff and Wales;
- Supports contemporary performance including light and sonic installation;
- Promotes the use of the city as a festival and conference destination in its own right;
- Build a 5-year plan to expand the festival
- Brings the city, region and nation together to promote culture in Cardiff and Wales on the world stage.

24. A report will be presented to Cabinet later in 2019 outlining the detail of the proposed event and associated budgetary implications.

Scrutiny Consideration

25. The Economy and Culture Scrutiny Committee considered this issue on 3 October 2019. The letter from the Chair is attached at Appendix 6.

Reason for Recommendations

26. To approve the next steps in establishing the Music Board and establishing a Music Strategy for Cardiff.

Financial Implications

27. The Cabinet Report sets out the Terms of Reference of the Cardiff Music Board and the Cabinet response to the Sound Diplomacy Report. Contained within the Sound Diplomacy Report is a recommendation to appoint a Music Officer and if this is progressed then the funding source will need to be established as there is currently no budget allocation for

this purpose. All other recommendations prior to be implemented will need to identify if any additional resource is required as there is no budgetary allocation currently set aside. Each recommendation needs to consider both the direct cost of implementation as well as the cost impact it may have on any other services.

Legal Implications

28. Legal Services are instructed that the client service area, in drafting the proposed Actions, have given careful consideration to the legal framework and policies that govern the Council functions and roles referred to (such as planning and licensing), and that the Actions can be achieved within legal constraints.
29. It is important to highlight, prior to implementing the various Actions as set out in the proposed response to the report, the appropriate advice is sought to ensure the Council complies with any applicable procedure. By way of example only, any proposed Traffic Regulation Orders must follow due statutory process prior to being implemented and becoming enforceable.
30. The Report recommends Members to approve the Terms of Reference for the Cardiff Music Board. Legal Services are instructed that the Music Board is not a decision making body but is a forum which aims to enable better communication between the Council and its music ecosystem. Accordingly, the Terms of Reference do not provide for decision making, rather their purpose is to clarify the role and responsibilities of the Board, its membership, its Terms of Reference generally and how the same will be resourced funded.
31. The decision about these recommendations has to be made in the context of the Council's public sector equality duties. The Council also has to satisfy its public sector duties under the Equality Act 2010 (including specific Welsh public sector duties). Pursuant to these legal duties, Councils must in making decisions have due regard to the need to (1) eliminate unlawful discrimination, (2) advance equality of opportunity and (3) foster good relations on the basis of protected characteristics. The Protected characteristics are: age, gender reassignment, sex, race – including ethnic or national origin, colour or nationality, disability, pregnancy and maternity, marriage and civil partnership, sexual orientation, religion or belief – including lack of belief. If the recommendations in the report are accepted and when any alternative options are considered, the Council will have to consider further the equalities implication and an Equality Impact Assessment may need to be completed.
32. The Well-Being of Future Generations (Wales) Act 2015 (“the Act”) places a ‘well-being duty’ on public bodies aimed at achieving 7 national well-being goals for Wales – a Wales that is prosperous, resilient, healthier, more equal, has cohesive communities, a vibrant culture and thriving Welsh language, and is globally responsible.

33. In discharging its duties under the Act, the Council has set and published well-being objectives designed to maximise its contribution to achieving the national well-being goals. The well-being objectives are set out in Cardiff's Corporate Plan 2018-21: <http://cmsprd.cardiff.gov.uk/ENG/Your-Council/Strategies-plans-and-policies/Corporate-Plan/Documents/Corporate%20Plan%202018-21.pdf>
34. The well-being duty also requires the Council to act in accordance with 'sustainable development principle'. This principle requires the Council to act in a way which seeks to ensure that the needs of the present are met without comprising the ability of future generations to meet their own needs. Put simply, this means that Council decision makers must take account of the impact of their decisions on people living their lives in Wales in the future. In doing so, the Council must:
- Look to the long term;
 - Focus on prevention by understanding the root causes of problems;
 - Deliver an integrated approach to achieving the 7 national well-being goals;
 - Work in collaboration with others to find shared sustainable solutions; and
 - Involve people from all sections of the community in the decisions which affect them.
35. The decision maker must be satisfied that the proposed decision accords with the principles above; and due regard must be given to the Statutory Guidance issued by the Welsh Ministers, which is accessible using the link below: <http://gov.wales/topics/people-and-communities/people/future-generations-act/statutory-guidance/?lang=en>
36. The Council has to be mindful of the Welsh Language (Wales) Measure 2011 and the Welsh Language Standards when making any policy decisions and consider the impact upon the Welsh language, the report and Equality Impact Assessment deals with all these obligations. The Council has to consider the Well-being of Future Generations (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.

RECOMMENDATIONS

Cabinet is recommended to:

- (1) Approve the response to the Sound Diplomacy Report attached as Appendix 2.
- (2) Approve the Terms of Reference for the Cardiff Music Board attached as Appendix 3.
- (3) Approve the appointments of the Cardiff Music Board and instruct the Director of Economic Development to appoint the individuals named in Confidential Appendix 5.

- (4) Delegate authority to the Director of Economic Development, in consultation with the Leader of the Council, the Cabinet Member for Culture and Leisure, the Monitoring Officer and Section 151 officer to work with partners to develop detailed proposals for the signature event as outlined in paragraph 22 of this report and to bring an update to a future Cabinet meeting.

SENIOR RESPONSIBLE OFFICER	Neil Hanratty Director of Economic Development
	4 October 2019

The following appendices are attached:

- Appendix 1: Sound Diplomacy Music Strategy Report: Music Ecosystem Study and Strategic Recommendations
- Appendix 2: Cardiff Council Response to Sound Diplomacy Report
- Appendix 3: Cardiff Music Board Terms of Reference
- Appendix 4: Cardiff Music Board Member Advertisement
- Appendix 5: Proposed Music Board Member Appointments Confidential
- Appendix 6: Letter from Chair of Scrutiny