

# Lessons from Down Under?

## Popular Music policy and decentralised government in Scotland and Australia

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### Abstract

This article provides a comparative analysis of popular music<sup>1</sup> policy developments in Scotland and Australia in recent years. It begins by making the case for this comparative analysis before going on to outline relevant policy developments in each country. The results of the author's empirical research in Australia are then presented in the context of this, providing lessons for Scottish policy-makers. Those lessons are outlined in the conclusion.

### Introduction

On 5 October 2006 a Music Industry Summit was held in Edinburgh. The result of lobbying from various quarters, it brought together representatives from a number of music organisations, businesses, academics, musicians and assorted other personnel who were seemingly united in only one belief – that something should be done by publicly-owned bodies to support popular music in Scotland.

The Summit was chaired by the Deputy First Minister, Nicol Stephen, in his capacity as Enterprise Minister. Patricia Ferguson, the Minister for Tourism, Culture and Sport, also attended. The presence of two ministers highlighted at least one issue – governmental support for popular music spans ministerial departments and is a matter of both cultural and economic concern. The Summit ended with the formation of a smaller working group to take matters forward. This met twice (16 November and 13 December 2006), with its work co-ordinated by the Enterprise, Transport and Lifelong Learning Department (ELTDD). A further Summit meeting on 27 February 2007 saw Stephen announce the setting up of a Scottish Music Futures

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1 Here I use the term popular music as it is defined by Roy Shuker (2001, p.9): 'a hybrid of musical traditions, style and influences, with the only common element being that it is characterised by a strong rhythmical component, and generally, but not exclusively, relies on electronic amplification. Indeed, a purely musical definition is insufficient since pop/rock's dominant characteristic is a socio-economic one: its mass production for a mass, predominately youth, market'.

Fund of £500,000 funded by the Scottish Executive (government). At the time of writing this funding looks set to be aimed at Scottish-based companies which have existed for five or more years and to be aimed at record labels, publishers, managers and agents. Following consultation, fuller details are due to be announced at the Go North Festival in Inverness on 8 June. It is anticipated that the money will be a one-off initiative, although the Executive will doubtless be heavily lobbied to continue this funding. Much will depend on how the initial money is used.

Meanwhile one notable absence from the Summit itself and the discussions that surrounded it was any meaningful international comparisons. No speakers were invited from outside the country and it appeared that popular music policy in Scotland would progress in splendid isolation. This article makes the case for comparative analysis and suggests that important comparisons can be made with – and lessons learned from – Australia. It starts by making the case for meaningful comparisons between the two countries, then outlines policy developments in Scotland before moving on to examine the Australian experience. Empirical research carried out in the (Scottish) summer of 2006 is then outlined before the implications for Scotland of the Australian experience is presented.

## Comparing Scotland and Australia

Initially comparisons between Scotland and Australia seem to be far fetched. One country has an area size of an area size of 7,682,300 square kilometres and a population of 20 million, the other consists of 78,772 square kilometres and a population of around 5 million. Australia is a fully fledged nation state, meaning that in terms of popular music policies it can intervene in areas such as quotas for commercial radio content and copyright reform. Scotland cannot do this and remains a 'stateless nation' (McCrone, 1992). The Scotland Act (1998), which provided for the establishment of a Scottish Parliament in 1999, 'reserved' key policy areas to the London-based UK Parliament. These included foreign policy, defence, benefit rates and, crucially for popular music, intellectual property legislation and broadcasting policy (see Symon, 2000, pp.285-286).

Despite these differences, meaningful comparisons can be made, as previous work in areas such as lifelong learning (Gallacher et al, 1996) and health (Stewart et al, 2001) shows. Of particular political importance is the fact that within the UK significant power is now devolved to the Scottish Parliament in ways analogous to the Australian (six) states and (two) territories system. Thus both countries have forms of non-centralised government and in many ways post 1999 Scottish politics is comparable to that of one of the Australian states, as in both cases 'devolved' government exercise significant, but limited, power in cultural and economic policy whilst being parts of larger nation-states. There are also geographic issues in Scotland, such as the remoteness of some places from the centre of political power, which are magnified several-fold in the Australian case. The countries share the same head of state, (variations of) the same language and a great deal of common history.

In addition, both countries' music industries operate within a global framework. The international recording sector is now dominated by former major multinational corporations (EMI, Sony-BMG, Warners and Universal). While all are present in Australia, none has a Scottish base. In both cases the need to export music beyond a limited domestic market is paramount. Scotland's main development agency has noted that: 'The ability to compete in global markets is critical to a small market like Scotland' (Scottish Enterprise, 2006, p.6). For Scottish popular musicians this means significant commercial success is only available internationally. A population size of 5 million means that few musicians can make meaningful livings from the Scottish market alone and major record companies would not invest in artists whose likely appeal would not travel beyond Scotland. This situation is somewhat mirrored in Australia where a population of 20 million is not sufficient to sustain high level commercial success and lingering feelings of 'cultural cringe' give an added impetus to the desire for international success. Both countries have seen attempts to develop policies to meet the needs of their popular musicians, and in order to further develop comparisons it is first necessary to outline developments in each.

## Popular Music policy in Scotland

The development of Scottish popular music policy has been traced in various places (c/f Cloonan, 2007, pp.119-139; Cloonan et al, 2004; Symon and Cloonan, 2002 and Williamson et al, 2003). In essence the story is one in which local politicians and activists have sought to develop distinctively Scottish solutions to the problems faced by music-related industries<sup>2</sup> and musicians in Scotland. This has been constrained by the fact, as noted above, that political devolution has left some key policy areas which impact on popular music, such as broadcasting and copyright legislation, under control of the UK Parliament.

In terms of popular music, the Scottish music economy performs above the UK average in the retail and live sector, but has significant areas of weakness in distribution, lack of associated professionals and lack of specialist media support (Williamson et al, 2003). The absence of major record companies noted previously is exacerbated by the fact that the country lacks an economically significant independent label and that all of Scotland's music businesses are small and medium enterprises (SMEs) as they employ under 250 people. The majority are sole traders.

The main impact of political devolution on Scotland-based musicians thus far has been that it has provided opportunities for policies to be developed at a new level as Members of the

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2 I use the term music-related industries (plural), rather than the more commonly used, music industry (singular) as the latter is often used as a substitute for the recording industry whereas my concern is with the broader industries including live music, publishing, retail etc. This is particularly important in Scotland which has a range of music industries but lacks the presence of any of the four major record companies. The importance of all this is spelt out in Williamson and Cloonan (2007).

Scottish Parliament (MSPs) and other policymakers have sought to develop the sort of distinctively Scottish solutions noted above. Effectively devolution began a process of reducing the distance that has separated popular music in Scotland from policymaking (Symon and Cloonan 2002) and acted as a catalyst for closer engagement between policymaking institutions and the country's music industries – albeit to limited effect thus far.

A number of pre-devolutionary developments also need noting. In 1987 *The List* listings magazine for the Glasgow and Edinburgh 'central belt' began publishing an annual special supplement - *The Rock Report*. These reported some recurring issues of the 1990s: the failure of Scottish acts to move from Scottish to wider success, the lack of local independent record companies and the absence of ancillary professionals such as specialist lawyers and accountants. In 1989 the Prince's Trust launched the Music in Scotland Trust (MIST) project. This funded unemployed young people with music-related business ideas that appeared sustainable. In 1994 MIST published *The Scottish Music Guide 94* which echoed the themes noted above, citing a talent flow south and the lack of a music business infrastructure as major concerns. In the early 1990s, the publicly-funded Scottish Development Agency (SDA) funded a Scottish pop chart, sponsored the New Music World seminar held in Glasgow in September 1990 and assisted the launch of an industries' membership organisation, the Scottish Recording Industry Association (SRIA). None of these lasted.

In common with the rest of the UK, Scotland then witnessed the commissioning of a series of mapping projects which began to document the scale of (popular) music activity within Scotland (Williamson 1995; Frith 1996). Scottish projects were included in the UK-wide *Mapping Hidden Talent* report (Ings et al 1998), a listing of, and commentary on, the popular music scene was produced for the Scottish Arts Council (Sano Music 1999), as was a survey of youth music projects (Williamson and Stewart 2000). Thus by the time of devolution long-term issues had been identified. The question remained, however, as to how post-devolutionary politics would deal with these.

## Post devolutionary developments

Nationally four bodies can be seen as having major impacts on post devolutionary developments – the Scottish Executive, the Cross Party Group, the Scottish Arts Council (SAC) and Scottish Enterprise (SE), and each will be discussed briefly.

### The Scottish Executive

The Labour/Liberal Democrat coalition government (known officially as the Scottish Executive), which formed after the first elections to the new Parliament included in its *Partnership for Scotland* a commitment to a national cultural strategy. However, the consultation document which followed (Scottish Executive, 1999) lacked specific mention of the music industries and

the cultural strategy document which followed, *Creating Our Future: Minding Our Past* (Scottish Executive, 2000), all but ignored popular music.

The main broader policy development which had potential to impact on music in Scotland was the announcement in late 2003 of a Cultural Commission to review the entire sector. Two years later its report (Cultural Commission, 2005) made 124 recommendations calling for legislation to enshrine four cultural rights – to fulfil creative potential, partake in cultural life, an enriched communal life and participation in designing and implementing cultural policy – in law. Its discussion of music was limited to a five page review within a 284 page report. Popular music got two and a half pages, mainly dealing with an SAC-led proposal for a music industry association. The Executive's response (Scottish Executive, 2006a) committed it to producing a Culture Bill that would provide a legislative framework through which to deliver the notion of cultural rights (ibid, p.21). This was published for consultation in December 2006 (Scottish Executive, 2006b). The major impact on popular music may be the setting up of Creative Scotland as a cultural development agency that will assume many of the roles currently undertaken by the SAC and Scottish Screen, with other roles being taken over by the Executive itself. In addition, a review of the enterprise networks' support for the creative industries (see below) 'including contemporary music' (Scottish Executive, 2006a, p.35) was promised. This was the only direct reference to popular music in the proposals.

At the time of writing the result of elections to the Scottish Parliament in May 2007 have raised the prospect of a minority Scottish National Party (SNP) government. This means that progress on many fronts – including cultural policy – is likely to be slow. However the commitment to the Futures Fund is likely to be met and may turn out to be the Executive's most important direct contribution to popular music policy.

## The Cross Party Group on the Scottish Contemporary Music Industry

Cross Party Groups are a means via which MSPs can pursue particular interests. They have no legislative or policy-making powers, but can act as a significant lobbying force, often with good access to ministers and the media. The Scottish Contemporary Music Industry Group was launched in December 2000 and had its first formal meeting in March 2001. Membership is open to all interested parties and includes MSPs, representatives of industries' organisations, music businesses, educationalists and other interested parties. It is chaired by Glasgow MSP Pauline McNeill and meets around five times a year. The Group has five sub-groups - Broadcasting; Talent Development; Recording, Publishing and New Media; Live Music; and Education – which meet on an *ad hoc* basis and report back to the main group with the aim of formulating policy documents to be taken forward to relevant ministers.

The Group issued a manifesto in November 2005, which called for the Executive to recognize the contribution made by the sector to Scotland's economy and to take a number of

steps to support it. A Live Music Code of Conduct was launched by the Group the following November. The Group's MSPs were also key players in the lobbying which led to the October Summit. More broadly the Group's mere existence means that key players meet regularly, thus providing the potential to influence popular music policy within Scotland, which would have been impossible prior to devolution.

## The Scottish Arts Council

The Scottish Arts Council (SAC) was founded in 1994, following a period of relative autonomy from the Arts Council of Great Britain. It currently 'champions and sustains the arts for Scotland' (Scottish Executive, 2003, p.119) by providing a mixture of core funding for various organisations and a range of grants for other activities including touring and recording. It has made increasing attempts to come to terms with popular music in recent years. In 1999 it formally agreed to study its potential role in contemporary popular music and commissioned the report on the scene noted above (Sano Music, 1999). A discussion paper setting the key issues followed (SAC, 1999). Henceforth pop and dance music were to be integrated into the SAC's general work and funding schemes (Knowles, 2000). Issues such as information services, training, education, promotion and music venues were to be addressed on the grounds that 'market forces... are not always the necessarily the arbiters of what is good' (ibid).

In March 2001 the SAC's *Contemporary Popular Music* committed it to providing additional resources for popular music, with touring, promotion and recording prioritised. Research and consultation with the sector were promised as key means of taking the programme forward (SAC, 2001, p.5), although the extent to which this has occurred is debatable. While the SAC (2002, p. 3) admitted that it came to popular music late, having previously concentrated on western classical music, its vision was now one of 'equity of opportunity... across musical styles and musical interests' (ibid, p. 7). So it has supported a range of projects including the annual Celtic Connections folk festival, the Showcase Scotland event for promoters and the regeneration of Glasgow's City Halls venue, as well as continuing to support recording and touring. The latter includes the National Lottery-funded Tune Up project which has emphasised supporting tours to (often geographically remote) venues which might not otherwise support popular music. Support is also available for acts to go to the South By South West (SXSW) convention in Austin, Texas, and further support comes via schemes not specifically aimed at music such as the Creative Scotland awards which were introduced under Lottery funding in 1999 to support artists working on specific projects.

One organisation previously funded by the SAC was New Music in Scotland (NEMIS). This membership organisation was founded in May 1999 with the aim of becoming a development agency for popular music. It offered advice, put on showcases, produced CDs for industries' conventions and came to be more of a network than a representative body. It was staffed by a single Development Officer and received funding from both SAC and SE. However in 2005 NEMIS' funds expired and it effectively ceased to function when SE and SAC declined to support

it further for reasons which are subject to allegation and counter-allegation from those closely involved. While NEMIS still exists as an internet presence ([www.nemis.org](http://www.nemis.org)), the net effect of the withdrawal of its funding is to leave Scotland without any national development agency for popular music. In comparison the classical sector is well served by the Scottish Music Centre which concentrates on classical music and provides services for the general public and its membership. It receives core funding from the SAC, has a staff of around a dozen and moved into new premises in the centre of Glasgow in late 2005. The historic imbalance which the SAC noted above is now enshrined in stone. While the appointment to SMC in 2005 of a new MD with a popular music background (Gill Maxwell, former manager of Deacon Blue) has prompted some speculation that SMC might take on more developmental roles, at present this remains pure speculation.

## Scottish Enterprise

Scottish Enterprise (SE) is ‘Scotland’s main economic development agency’ (SE, 2006, p.1), dealing with the bulk of the Scottish mainland.<sup>3</sup> It has worked in five areas of music: research, business advice, events, tertiary education and business finance (Symon and Cloonan 2002, pp.110-111). In 2000 it commissioned a report, *The Value of Music in Scotland* (Laing, 2000) which provided baseline data about the Scottish music industries, estimating that they provided a total of 7,306 full-time equivalent (FTE) jobs and produced an added value of £95.4 million annually. The report suggested several areas where the Scottish industries appeared to be deficient, including record companies (where the largest employed six people). However it simply mapped the contemporary situation and did not suggest any remedies.

In 2001 SE launched *Creative Scotland*, a £25 million package aimed at developing the country’s creative industries within the broader *Smart Successful Scotland* strategy based on productivity, entrepreneurship, skills and digital competition (Scottish Executive, 2001). In late 2001 and early 2002 SE’s music policies (or lack thereof) were heavily criticised by members of the Cross Party Group who demanded that SE’s music team attend its meetings in order to publicly explain themselves. These stormy encounters apparently convinced SE that it had to placate the critics, so it commissioned a mapping exercise of the industries’ value which will be discussed below.

SE also helped to finance Music Works, a music industries’ convention which took place annually in Glasgow from autumn 2002 to 2005. However funding was withdrawn when the

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3 Highlands and Islands Enterprise, which is the development agency for the north and the islands, covers the rest. It has worked on a number of music projects including the Music Industry Development and Support (MIDAS) project which was launched in 1998 by HI-Arts (Highlands and Islands Arts Ltd.) and the annual Go North festival in Aberdeen. In addition it supports the Highland and Islands Label (HAIL) project. See [www.hi-arts.co.uk/hail](http://www.hi-arts.co.uk/hail). Its work here resulted in it being given responsibility for the Scottish Music Futures Fund in February 2007, although it also appeared that senior SE officials did not want to take that responsibility.

convention was unable to move to the self-financing status that SE had envisaged for it. SE has also funded such things as the annual Go North festival in Aberdeen and produced a *Support for the Scottish Music Industry* brochure (Scottish Enterprise, 2005). But music does not feature in its current list of priorities (Scottish Enterprise, 2006), which resulted in responsibility for the Futures Fund being given to the other main development agency, Highlands and Islands Enterprise (see footnote 4). Meanwhile the Scottish Executive (2006, p.35) has promised to 'assess the extent to which there are gaps in the current enterprise support services for the creative industries – including contemporary music' and suggested that this might mean transferring some of SE's roles elsewhere or developing a more specific role for it. Once again the election results raise questions about what will happen. Meanwhile some export support for the Scottish music industries is also available from Scottish Development International, although its main orientation is towards attracting inward investment. In 1998 its predecessor, Scottish Trade International (formerly Scotland the Brand) began sponsoring a Scottish record industry stall at annual MIDEM music convention in Cannes.

SE was also responsible for what has been by far the biggest single public sector investment in popular music thus far. This came on 6 November 2003 when the MTV Europe Awards were held in Edinburgh. MTV had stipulated that if funding was not forthcoming then the awards would not come to Edinburgh (SQW, 2004, p.1) and they were staged thanks to the provision of £500,000 from SE and £250,000 each from Edinburgh City Council and the publicly-owned EventScotland. While this funding was for a popular music event, it was always clear that the motivation was economic rather than cultural. Thus the impact study of the awards (ibid) was limited solely to the economic consequences. In addition it was published just two months after the event (with a Christmas and New Year holiday in between). While the report allowed the Executive to claim that the event had generated £8.9 million in economic benefits, this should be treated with some scepticism as the report relies heavily on self-reporting from interviewees. Its finding that 23.5 jobs of a year's duration were created (ibid, p.23) suggests each of these cost around £32,000. By way of comparison the SAC's annual grant to the NEMIS organisation was just £16,000. The report's emphasis on Edinburgh's image, rather than Scottish music is shown by its estimation that the media coverage of the city was worth the equivalent of £8.6 million in advertising (ibid, p.32). No attempt was made to estimate the value to the local music industries where the report noted that 'the opportunities for businesses were limited' (ibid, p.44) as the awards 'may not have been an event that offered many opportunities for direct contact' (ibid, p.53).

Overall it is clear that SE's interventions have suffered from the fact that it has no music policy *per se*. Rather it has treated music as part of the creative industries more broadly and thus ignored the specialist requirements of the music sector. Its involvement in popular music thus far has been a series of initiatives, rather than a coherent policy and its major investment looked for short-term publicity rather than long-term development.

## Mapping

As noted earlier, SE moved to placate its critics by funding a mapping exercise of the entire music industries in Scotland. In July 2002 a team made up of myself, John Williamson and Simon Frith were commissioned to undertake this research. Our report was published in February 2003 (Williamson et al, 2003). The main findings were that:

- › Scotland generates around £106 million annually in sales of music and services. However this can fluctuate greatly depending on what albums are released by major Scottish-based artists and what stadium gigs take place in any given year.
- › Additionally the public sector contributes around £18.8 million to the music economy through the SAC, the Enterprise network and local authorities.
- › The industries are made up of approximately 2,040 full time employees and 2,003 part time workers, with hundreds of seasonal workers at festivals etc. (We saw Laing's analysis of 7,306 FTEs as a major over-estimation).
- › Scotland has personnel working in all the major sectors of the music industry, although several areas - notably distribution and management - are weak.
- › While investment by the major record labels in Scottish artists has declined, investment by international companies in the Scottish live music scene has increased, showing the relative health of that sector.
- › The retail sector is also buoyant.
- › In addition we were asked to identify a number of obstacles to economic development. These we found to be:
  - › The lack of music provision (of all sorts) in schools (which has now been addressed to some extent by the Executive's new provisions, see SAC, 2006).
  - › A perceived under-investment in Scottish-based artists by the major record labels and the public sector.
  - › A general lack of Scottish media support for domestically based music.
  - › A lack of clarity and understanding about the role of the public sector, particularly in relation to the mechanics of funding.
  - › A lack of business service providers within the industry, such as managers, agents and publicists.
  - › A perceived lack of entrepreneurial skills amongst both Scottish artists and intermediaries.
  - › A tension between the public sector's concern for the Scottish national interest and the private sector's international perspective.
  - › The lack of a Scottish music industry trade and lobbying association (see below) (ibid, pp. iv-vi).

Our main finding was that above all else what Scotland needed was a major act to break through and achieve international status comparable to that of U2, a product of another small country. To some extent that success of Snow Patrol (whose album *Eyes Open* was the UK's

top seller in 2006) and Franz Ferdinand since the report has provided some prospect of this although whether they have the political will to carry out large-scale activities from a Scottish base remains to be seen.

Our second major finding was the live sector in Scotland is flourishing. However it is dominated by two promoters (Regular and DF - the latter owned by the Irish-based MCD Concerts). It is also a site for the increasing economic interest of such global players as the promotions company Live Nation (part of the US-based Clear Channel conglomerate) and the ticket agents, Ticketmaster. The latter has an exclusive agreement with DF Concerts and this example serves to illustrate the complexity of the current situation: A Scottish based (but Irish-owned) company has reached a deal with a US-owned company (with several national branches) to sell tickets to (mainly) Scottish consumers under UK law which is administered locally but without input from its devolved Parliament. Meanwhile Scotland's passion for live music illustrates another comparison with Australia where the Australian live scene has assumed an almost mythical status as a breeding ground for international success (Homan, 2000).

We also found that Scotland's population size makes it an inherently limited market. The most successful independent record companies such as Chemikal Underground, Lismor and Soma have remained comparatively small scale. We concluded that rather than trying to build big companies, the most important policy for SE would be to ensure that existing Scottish-based music-related SMEs can sustain themselves. A successful Scottish music-related business or act has to operate within a wider UK and international context. Thus the final issue we encountered was the question of the extent to which any of the problems we identified were particularly 'Scottish' or part of much broader international trends. Once again this allows meaningful parallels to be drawn with Australia.

## The Associates?

Meanwhile a concern that Scottish politicians do not know who can speak on behalf of 'the music industry' led to key players, especially within the SAC and the Musicians' Union, to conclude that the solution was the formation of a Scottish Music Industry Association (SMIA) as an umbrella body through which to lobby politicians. In 2004 the SAC commissioned a feasibility study of this undertaken by the Ekos consultancy. Its initial report was completed in December 2004 and then put out for consultation in early 2005 (SAC, 2005a). A further consultation document followed (SAC, 2005b). This argued that a fee-paying membership organisation was not feasible as this would not provide enough income (*ibid*, p.4). Because of this it was suggested that the SMIA should be a representative organisation, funded from various public sources.

A final report was produced in the summer of 2005 (Ekos, 2005). It notes 'a general feeling... that the music industry in Scotland is too fragmented' (*ibid*, p.37) and that 'different

parts of the music industry may have different concerns' (ibid). Furthermore there was a recognition that 'different parts of the industry are often in conflict' (ibid, p.39). But it argued that this fragmentation made the case for the SMIA stronger (ibid, p.45). Overall there was 'widespread (but not universal) support for the concept of a Music Industry Association' (ibid, p.40). Having examined four possible models, the report recommended that the proposed SMIA be publicly funded (by the SAC, HIE, SE, the Executive and others) for an initial three-year period, with staff consisting of a CEO and an administrator. In part the case for public funding came because 'the very idea of the SMIA was born' within this sector (ibid, p.88). However one of the major reasons why membership fees were not seen as feasible was because some key organisations and individuals whose presence was necessary to give any SMIA legitimacy were already paying fees for such UK-wide organisations as the Musicians' Union, Performing Right Society (PRS) and Association of Independent Music (AIM) and would be very reluctant to pay another fee. In other words, while the idea of the SMIA was conceived largely within the public sector, many of the key commercial players saw their interests as best being served at a UK level. Thus while devolution might have spurred some of the thinking behind the SMIA its limitations also played a role in scuppering it.

Following receipt of the report, the SAC met with civil servants from the Scottish Executive who declined to offer financial support for the project. SAC then asked its consultants to come up with a scaled down version of its original proposal. This led to the conclusion that a Forum consisting of a part-time chair with support from a board and a secretary was the way forward (Ekos, 2006). At the time of writing the SAC is still trying to look for co-funding for this project. However it is difficult to envisage such a small body being particularly effective. In addition if the underlying premise of the Forum that the answer to problems in the music industries in Scotland lay within Scotland itself, then our research suggested that 'Scottish' issues reflected a local dimension of international concerns which were given a particular orientation by the effects of devolution. Thus purely Scottish solutions are not tenable. The fact that many businesses and individuals see UK bodies as more important is a key one as it suggests that whatever problems they have, they also envisage solutions as coming from outwith Scotland.

## Commentary

At the time of writing the future of funding of popular music in Scotland is once again in the balance as Scottish Enterprise does not see it as a priority, the SAC is set to morph into Creative Scotland, NEMIS has gone and the much hoped-for SMIA seems set to be watered down into being a Forum. While the Futures Fund is a significant development, its impact will remain limited if further financial support for popular music initiatives is not forthcoming from the Executive in future years. Overall popular music policy in Scotland is in a complex situation. Its Parliament lacks many of the powers which its music industries need to flourish. The Scottish Executive cannot provide tax breaks, impose content quotas on broadcasters, impose tax levies on blank CDs, or influence the distribution of rights income - all policies which have been successfully used in small countries that have had global musical success, such as Sweden and Ireland.

However, the major problem is a lack of focus. There are two ministers involved, numerous organisations and activists but no single place to debate policy and drive it forward.

Thus far the experience of devolution has partly been the experience of demonstrating the limitations of what is in effect a form of regional government within a bigger state. Devolution has led to more scrutiny of public agencies by Parliament and Cross Party Groups and to increased lobbying. However the nature of that lobbying with regard to the music industries has been inevitably affected by the shape of those industries within Scotland. The result has been policies which try to (i) help successful acts stay in Scotland, (ii) help Scottish acts and companies go international and (iii) build an infrastructure within a context of intense competition for public funds. The role of devolutionary politics here is to both enhance and demarcate the possibilities for building specifically Scottish solutions to the problems of its music industries. It was the search for possible solutions to such problems which informed the Australian part of my research, to which I now turn.

## Australian Popular Music Policy

Australia's make up of six states and two territories makes it possible to examine popular music policies at a number of levels. This is further evidenced by the fact that some state capitals and other major cities also have cultural policies. Additionally as with their Scottish compatriots, Australia-based musicians are part of a global network of music industries.

The country has witnessed important popular music policy developments at both federal and state level. Since 1996 federal politics have been dominated by the success of John Howard's Liberal-National coalition and national popular music policy *per se* has barely existed in any coherent sense. One of the government's first acts was to cease funding for the Ausmusic development organisation which had offices in each state (Breen, 1995). It then decided to allow parallel imports of CDs. Previously Australian copyright holders had been able to prevent CDs made legitimately elsewhere from entering the country, but from July 1998 they could no longer do so. As parallel import CDs were likely to be cheaper than Australian ones, an obvious potential existed for this move to hit the profitability of Australia-based companies (while possibly benefiting Australian consumers). In recognition of this the government announced AU\$ 10 Million (approximately £4 million) funding for the development of the contemporary music industries over a three year period. Of this AU\$5.45m was administered by the Australia Council for the Arts (known as the Australia Council) and aimed at the independent sector where organisations such as the Music Managers' Forum and the Association of Independent Record Labels (AIR) received funding. In addition AU\$1.05m went to a Contemporary Music Touring Program, \$1.5m to support community radio, and AU\$1m each to Arts South Australia and Arts Tasmania

Meanwhile various forms of ongoing support are provided by the Australia Council and Austrade. The Council's role is to support artistic endeavour and offer advice to the govern-

ment. Like the SAC it came to popular music late, but its current policy is to support all kinds of music of the requisite quality (Australia Council, 2006, p.66). It supports activities such as ‘songwriting, composition, performances, CD recordings, touring within Australia’ (ibid). Austrade is a federal body within the Foreign Affairs and Trade portfolio, created by the Australian Trade Commission Act 1985. Its mission is ‘to contribute to community wealth by helping more Australians succeed in export and international business’ ([www.austrade.gov.au](http://www.austrade.gov.au)) through the provision of market intelligence and advice. It provides various forms of export support and this can include support for music-related industries.

As funding from the AU\$ 10m began to run out, the Australia Council was aware of the potential for recipient organisations to approach it for further funding which it was unlikely to have. In order to forestall potential problems, it organised six Round Table meetings between 2001 and 2003 which considered options. These meetings eventually mutated into the Contemporary Music Working Group (CMWG) which brought together representatives from across the music industries. In October 2003 it produced a consultative report entitled *The Power and the Passion* which summarised its discussions and suggested possible actions. It called for a consultant to be retained to establish an industry based information service, look at longer term options, undertake specific research and produce a final report, which some industries’ bodies had agreed to fund (Simpson *et al*, 2003, p.16).

The report also noted that those involved had ‘varied interests’ (ibid, p.3), meaning that ‘unanimity is highly unlikely’ (ibid). The main issues causing it concern were local radio content, indigenous issues, live music, cultural sovereignty, export initiatives, intellectual property, the need for reliable statistics, skills development, investment and taxation issues (ibid, p.4). Four possible ways forward - an Industry Based Information Service (IBIS), an Industry Action Agenda (IAA), a Non-governmental Representative Organisation (NGRO) and a federal Statutory Agency (SA) (ibid, p.5) - and their implications were outlined. The latter remained ‘an ultimate goal’ for many people involved in the discussions (ibid, p.11) and it was noted that an IBIS could lead to an IAA, to be successively followed by either an NGRO or a SA (ibid, p. 14).

In 2005 another report, *Let’s Get The Show on the Road* was funded by a range of industries’ organisations and the Australia Council. Its subtitle – ‘A Framework for a cohesive contemporary Music Industry’ – reflects what some key personnel and the authors saw as being a key issue. The report was based on consultations with industries’ personnel and aimed to identify which of the four proposed options (or any other), should be pursued (Allen, 2005, p.v). Its overview of the industries as being small, ‘highly fragmented’, supported by government but in piecemeal and unfocussed ways, lacking unified representation to government and operating in a digital environment (ibid, pp.v-vi) echoed Scottish concerns. The main issues identified were the need for the federal government to have cohesive industry-wide strategy (including mechanisms for more industry coordination and a focus on exports) and for the music industries to have a voice which could make a cohesive case to government (ibid, p.vi).

The report saw an IAA as the best way forward. This is ‘a process whereby the Commonwealth Government and an industry work together to identify priority areas of change’ (ibid, p.27). Setting up an IAA requires five criteria to be met: there must be a whole (federal and state) government approach; the industry must be, or have the potential to be, a substantial economic aggregation; significant market opportunities must exist; substantial pressures exist for sectoral adjustment; and the industry must have demonstrated some comparative/competitive advantage (ibid). The report believed that these requirements had mostly been met (ibid, pp.28-30). It opted for an IAA on the basis that this could provide a workable framework and engage federal, state and territory governments.

An IAA proposal was then produced (CMWG, 2006). This again noted that the music industries’ ‘fragmented nature means that stakeholders’ views... are often highly specific to their interests and lack a broader sense of the industry’s position’ (ibid, p.3). It included another overview of the industries, an evaluation of progress towards IAA status and the proposed outcomes of such a process. Increased competition from overseas and from other leisure activities were cited as reasons to act in a more coordinated manner than had previously been the case (ibid, p.12). The proposal suggested that the growing importance of the creative industries generally and potential growth markets in music in particular made a continued lack of federal government action untenable. It hoped that the IAA would address such issues as mechanisms for improved industries-government links, reform of barriers to growth, sector-specific training, reappraisal of funding, market development and supply chain integration (ibid, p.19).

Meanwhile another significant development was the signing of a free trade agreement between the US and Australia in 2005. One of its effects was to prevent the Australian government from intervention in certain areas, including preventing it from raising the Australian content quotas which currently exist for commercial radio. Henceforth these can only be lowered. The treaty has been subject to stinging criticism from sections of the music industries (c/f Letts, 2005).

Australia also has a range of popular music policies at state level. But the pattern of government support for popular music policies varies greatly across states. Some have their own organisations with various lobbying, development and advocacy roles. Thus New South Wales has Music New South Wales, Queensland Q Music, Tasmania Tas Music and Western Australia Music Industry Association (WAMi). In addition, the Northern Territory has Music NT. Funding is generally provided by state arts ministries and/or the Australia Council. In Victoria and South Australia the arts ministries take on many of the roles performed by state music organisations elsewhere. However the existence in Australia of such organisations and the developmental role they perform is in marked contrast to Scotland.

In sum the situation at the time of my research was of a number of initiatives at state level and of attempts to develop some cohesion at national level. In order to learn more about how all this worked on the ground it was necessary to talk to those closer to the coal face.

## Researching Australian Music Policy

In August and September 2006 I carried out face-to-face interviews with eleven organisations<sup>4</sup> involved in various aspects of Australian popular music policy, chosen on the basis of having received at least some governmental funding for their activities. Interviews were arranged after initial email contact and the research outcomes were affected by factors such as the willingness of organisations to respond, availability of personnel, my own time constraints and my status as an outsider looking in. The interviews sought to ascertain views on which approaches towards policy worked best and what purposes such policies serve. Interviews were semi-structured and recorded for subsequent textual analysis. Interviewees were sent transcripts for verification and further comment. While the qualitative approach was designed to elicit responses which were illustrative rather than necessarily representative, the regularity with which a number of points were raised showed them to be key issues. The broader findings are reported elsewhere (Cloonan, 2008), while here I examine five areas which seem to have important lessons for Scotland. In what follows I draw upon the interviews and materials brought to my attention by interviewees.

## Lessons?

Thematic analysis on the interview transcripts revealed there were five particular areas where Scotland's policymakers might learn lessons from Australia. These were as follows: the need for development agencies, the importance of live music, the need to get export policies right, the development of popular music policies for youth, and the need to retain musical talent. While these issues will be dealt with successively here, it is important to emphasise that these are overlapping and interacting concerns.

The first thing to note is that the very existence of state-level development agencies stands in marked contrast to Scotland. While interviewees were aware that such agencies were often under-funded (for example, Q Music consists of two part-time employees) they still provided a focus absent within Scotland. Funded by the state, but at arm's length, bodies such as WAMi and Music NSW can lobby politicians and support musicians in ways which Scotland lacks. The most successful model in Australia is WAMi, which has around ten employees and so is able to undertake a range of activities. Interviewees repeatedly cited WAMi as a success and it should be noted here that its annual funding (and thus range of activities) is well in excess of what is being proposed for Scotland's Forum.

Australian interviewees were sceptical about the value of a representative body along the lines of the SMIA, as similar things had been proposed, but rejected, there. It was realised that fragmentation and disunity meant that loose coalitions on particular issues might be all that

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4 See Appendix for list.

was possible. The lesson here for Scotland is to abandon the idea of a representative body and look for a developmental one. In Scotland the creation of a development agency may shatter a fragile unity of the public and commercial sectors around the idea of an SMIA. Furthermore if the major commercial players were absent, then this would run the risk of undermining the legitimacy which the Cross Party Group has sought to develop. However, there are ways of engaging key commercial players in such projects (such as having them on the board). Meanwhile the gap in provision left by the demise of NEMIS continues to be felt and Australia at least offers some viable models for popular music development agencies.

In terms of live music, as noted earlier, Scotland's live music scene is particularly vibrant (Williamson *et al*, 2003). Meanwhile Australia's has attained an almost mythical status as the place where OzRock - the country's most internationally commercially successful popular music form - was spawned (Homan, 2000). A recent New South Wales report noted that 'live performance remains crucial in the development of artists' (Johnson and Homan 2002, p.2). Importantly any decline in live music venues would almost certainly impact on Australia's competitiveness in the international music market (*ibid*, p.3). However, factors such as increased competition from other entertainments, changing music tastes (such as the rise of dance) and various other social and economic factors have served to undermine the viability of live music across Australia.

One issue which has attracted widespread governmental (and media) attention in recent years has concerned patterns of gentrification of the sorts of inner city areas that traditionally hosted popular music venues. Many cities have abandoned a policy of 'zoning' particular areas and encouraged mixed use, resulting in numerous cases of an influx of people keen to enjoy the inner city lifestyle which various redevelopment schemes have promised. Live music was often employed to sell such lifestyles and a report in Victoria noted that 'one reason put forward for the trend towards inner city living is the contribution that live music venues... make towards the vitality of such neighbourhoods' (Carbines, 2003, pp.27-28). But it was also being reported that new residents were often behind an increasing number of complaints to local authorities about noise from venues. In reality, Brisbane City Council (2005, p.7) found that most complaints about noise came from other businesses and that the majority of complaints from neighbours came from longstanding - rather than new - residents. This was broadly replicated in New South Wales (Homan and Johnson, 2002, p.31). Nevertheless it was clear that venues were increasingly subject to complaints at exactly the same time that their cultural value was being trumpeted in a number of places.

Across Australia councils attempted to implement policies which balanced the concerns of all stakeholders, while also publishing celebratory accounts of the value of live music. So Brisbane's *Valley Music Harmony Plan* (Brisbane City Council 2005) stated that 'Brisbane City Council realizes that live music in all its styles is valuable to our economy' (*ibid*, p.2), while Victoria's *Live Music Taskforce Report* claimed that 'Melbourne's live music culture is internationally recognised and locally celebrated' (Carbines, 2003, p.10), before going on to note tensions which have arisen as new people moved into inner city areas. In terms of remedies, the Western Aus-

tralian government had set up the Sound Attenuation Support Program (SASP). in Perth ([www.dca.wa.gov.au/sasp.asp](http://www.dca.wa.gov.au/sasp.asp)) which offers matching funding to help venues with soundproofing as well as assisting in venues' communication plans.

The *Vanishing Acts* report in New South Wales (Johnson and Homan, 2002) was commissioned following concern that the amount of venues in the state was declining. It highlighted concerns about the impact of poker machines on live venues while also noting that gambling venues might also stage live music (ibid, pp.1 and 38). Victoria Owens of ArtsNSW argued that the report 'really started a lot of stuff happening'. Its publication witnessed renewed lobbying from live music campaigners. In September 2006 it was announced that the Premier, Morris Iemma, was planning to support licensing reform aimed at rationalising the system within NSW and making it easier to stage live music.

The various reports illustrated the complexity of regulating and promoting live music, as amongst other agencies necessarily involved are the police, liquor licensing boards, local authorities, licence premise operators, other local businesses, residents, patrons, venues, musicians and local authorities. Moreover, policies in other areas constantly had the potential to impact on live music. Thus, for example, regulation of gambling in Australia is done at state level and varies across the country meaning that so does the impact that this activity has on such (potential) venues as pubs.

States such as New South Wales and Western Australia attempted to deal with neighbour complaints through enshrining mediation processes within state law. They also attempted to uphold the right of first occupant, so that developers and potential new residents should consider existing venues, while new venues similarly had to consider existing residents and businesses. In Perth Marti Cunningham of SASP spoke of the need for 'some give and take'. This meant acknowledging that 'these venues are here, we're working to try and help them manage to sound the best they can but essentially they are either there or they're not. We want them to be there so let's work out a way where we can sort of make it work for everyone'. A range of stakeholders such as venue operators, residents and developers had to be addressed so that 'it's really looking at it from all ways' and 'What we are really trying to promote is best practice'.

Brisbane City Council's review of live music resulted in its *Plan* which sought to guarantee the status of its Fortitude Valley area as the cradle of the state's live music scene. The fact that it sought to continue the Valley's live music tradition was cited by Glenda Johnson of Arts Queensland as 'a bit of a win for the Brissie scene' with implications across Australia. This was echoed by Denise Foley of Q Music who said that the *Plan* did 'a lot of good for retaining the identity and the culture of this area'

The range of activities around live music, combined with its importance historically, resulted in interviewees frequently citing its importance. An example was the importance attached to tour support in a situation where the sheer size of Australia provides logistical and financial difficulties. Even touring within a state can be difficult for emerging acts and popular music

development agencies routinely have tour support programmes. Paul Bodlovich of WAMi stated that (publicly provided) 'touring money is incredibly important... That's something which governments I think all round the country need to accept'. Despite examples such as that in New South Wales where acts can apply for funds of up to \$5,000 (approx £2,000) to fund their state tours, AIR's Stuart Watters commented that more support was needed across the country.

Interviewees also cited the need to develop audiences for live music. The *Let's* report (Allen, 2005, p.15) had noted that lack of 'consumer demand for live music was clearly the dominant factor retarding live music'. Here Bodlovich noted that: 'There's been a complete absence of audience development for live contemporary music targeted towards young people'. This was echoed in New South Wales where respondents to a survey 'frequently reported that 'kids are not educated to watch/want live musicians'' (Johnson and Homan, 2002, p.40). Some of this was being addressed by the youth programmes which will be discussed below.

Interviewees also realised that to be truly successful meant to go international or, in business terms, to export product. The *Let's* report (2005, p.13) noted that in Australia 'producers can only sell to a relatively small market before facing the hurdles of exporting' and interviewees routinely referred to this. Thus Stuart Watters said: 'I think we need to be an export-focussed territory by virtue of our isolation from the rest of the world. We are an extremely small part of the market and there's only room in the stable in Australia for a range of successful or large artists'. Australia's geographic remoteness implies both market and geographic disadvantage. A chapter title in *Let's* cited Australia as a 'small fish in a big pond' and it was clear that interviewees saw government as having an obligation to help that fish grow. The Australia Council is obliged by the Act under which it was formed to promote knowledge and appreciation of Australian arts. It therefore works in international market development and promotions. Popular musicians can apply to schemes such as International Pathways for tour support. In addition Austrade has responsibility for supporting exports and it is possible for music-related projects to apply for Export Market Development Grants.

Various agencies at both state and federal level support acts and/or companies which want to go to important international music conventions such as SXSW and MIDEM. Thus, for example, Music New South Wales provides support and the services of a tour manager for acts visiting SXSW. However interviewees constantly referred to the state system as being a disadvantage here, as each state tended to have its own export division with its own agenda. Thus, the branding of Australian music did not appear to have been successful. Paul Bodlovich argued that: 'There's no one there looking at it and going 'Is there a brand? Is there a consistent brand? Is the brand Australia?'. This was echoed by Chris Bowen of Arts Queensland who said that at trade fairs his international colleagues said to him 'you guys have got a lot of institutions, but you haven't got your act together, you're really disorganised'. Similarly Phil Jones of Arts Victoria believed that popular music exports was an areas which 'I don't feel has really had its time yet'. In addition, Stuart Watters saw a lack of consistency in responses by Austrade repre-

sentatives across the country and in international offices. He opined that: ‘there’s absolutely no consistent theme across any of the territories about how to engage and interact with music’

Exporting also implied importing knowledge and John Davis of the Australian Music Centre said that contact with international colleagues ‘makes me understand far more clearly what it is I’m doing and why I’m doing it here’. In addition knowledge of developments elsewhere could also act as a spur to demand more at home. Thus, for example, interviewees referred to other models such as Sweden, Canada and New Zealand as examples which Australia could learn from. Q Music’s Denise Foley was concerned that the sorts of economic returns required by state export departments could not be produced by local music-related companies within the timescale demanded. She responded by making exports a big part of Q Music’s Big Sound conference. Meanwhile Stuart Watters was keen to promote bringing buyers to market so that ideally – ‘you have an annual allocation that enables this sector to be able to bring people here, which is sometimes a lot cheaper than sending large delegations’.

Interviewees found three main faults with existing exports policy. The first was a competition between state initiatives at the expense of broader Australian collaboration. Secondly, the pattern of support seemed to be both complicated and uneven, as references were made to the export policies of the Australia Council, Austrade, the trades and cultural arms of various state agencies and to Austrade’s overseas offices. The combined effect of this produced the third complaint – that there was not a consistent Australian brand which could be promoted at trade fairs.

Interviewees were much more positive in another frequently cited issue - that of attempts to promote youth involvement in promoting and producing alcohol and drug free live music events. The initial instigator of this appears to have been Victoria’s Freeza programme ([www.freeza.vic.gov.au](http://www.freeza.vic.gov.au)) which involves young people promoting such gigs. It includes The Push project ([www.thepush.org.au](http://www.thepush.org.au)) which uses young people’s promoting of gigs in order to help them participate in their local community. Similar projects include the Rammpage project in Western Australia ([www.rammpage.com.au](http://www.rammpage.com.au)), the Indent (Independent Entertainment Network) project in New South Wales ([www.indent.net.au](http://www.indent.net.au)) and the A-Venue project in Queensland ([www.qmusic.com.au/a-venue/index.cfm](http://www.qmusic.com.au/a-venue/index.cfm)). The Australia Council has a programme called Buzz, a young and emerging artists initiative which seeks to get them to collaborate with professionals. Arts WA has produced an educational pack for schools about Western Australian music and the music industries.

These moves formed part of a more general desire to support youth culture. Thus David Hinchliffe, Brisbane’s Deputy Mayor, wrote that ‘Youth culture needs a positive outlet. This is fundamental to our future as a creative and inclusive city’ (Brisbane City Council 2005). As such, the youth initiatives were part of a broader programme of using popular music for social inclusion. Among these were various projects aimed at indigenous musicians, including Music New South Wales’ Which Way programme, and WAMi has an Indigenous Music Officer.

Three motivations seem to lie behind the youth projects. First there was simply the desire to develop youth policies of which popular music policy was merely one part. The need to respond politically to such demands was evident in conversations with a number of organisations, especially state-based ones. Secondly there was a desire for audience development, so that young people developed a taste for live music and thus supported an often fragile live music scene and guaranteed future demand – the importance of which was noted earlier. Related to this was the third motivation - a desire to develop music industries' personnel for future years. Involvement in these projects had the potential to develop promoters and other ancillary workers for the future, which was warmly welcomed. Thus Jane Powles of Music New South Wales spoke of Indent's potential to lead towards developing the industry infrastructure for when they're actually older.

Once such people are developed they need to be retained in order to further talent to develop and/or be attracted to particular locations. Interviewees were asked about this and their replies indicated that the importance attached to retention varied according to location. Thus interviewees in cities traditionally associated with the music industries, such as Sydney and Melbourne, saw their locations as magnets for musicians. But for other interviewees, their daily tasks involved making it practical for musicians to live in their home state. Bodlovich asked rhetorically 'why shouldn't they be able to live in Perth?'. He saw popular music policies as 'about this city as a place to live' and giving local musicians as much chance to make it on the world stage as those born in London or New York. For him, that the successful local band Eskimo Joe continued to live in Perth was 'more valuable than any number of workshops on the creative industries'. Q Music's Denise Foley, said that the point was that, 'We wanna be able to create the opportunities for younger musicians to develop here' (emphasis Foley). While such sentiments did not always result in practical policies, they obviously informed daily praxis and as such showed a sentiment which would be shared in the SAC and SE.

## Conclusion

The nature of my research and my limited time in Australia did not allow me to evaluate any of the projects outlined above. However, the very existence of the sorts of youth programmes and development agencies encountered in Australia stands in marked contrast to the situation in Scotland. I began by arguing that comparisons between Scotland and Australia are valid, and that Scottish popular music policymakers could learn lessons from their Australian counterparts. Organisationally it was clear to me that the existence of state organisations provided a potential focus for developments, which is lacking in Scotland. Despite often small budgets and staff, these organisations provide examples of the sort of one-stop shop for emergent musicians which Scotland currently lacks. Interviewees suggested that the most successful of the Australian organisations was WAMi which had benefited from comparatively large state funding and thus the ability to employ more staff and undertake more projects. It would appear that WAMi has much to teach Scotland.

If WAMi is a specific case, then more broadly the three issues above provide more lessons. In terms of live music the lesson is that this must be seen by politicians as part of the country's cultural heritage and vibrancy so that when venues are threatened with closure, steps are taken to assure their future. In Australia gentrification posed a threat which has been echoed in Scotland. The recent closure of Edinburgh venue, The Venue, to build flats is simply the latest example of the loss of live music spaces which has also included the Cas Rock Bar and the Tap O' Lauriston. It is by no means certain that moves similar to those taken across Australia would have saved these venues, but until the political case is made for the cultural importance of such places further closures seem inevitable. The comparative success of Glasgow in establishing new venues (The Carling Academy, ABC, Oran Mor and Classic Grand) should not breed complacency. In Australia moves to protect live music scenes were often the result of lobbying which led to the creation of live music taskforces. A similar taskforce in Scotland might go some way to assuring that it continues to punch above its weight in enjoying live popular music. Again, the Australia experience has much to offer Scottish policymakers.

The country also needs to learn from Australia's export efforts. The two countries seem to be similar in having uncoordinated efforts (complicated in Scotland's case by the role of the UK's Department of Trade and Industry) and an applications system which is opaque. Both countries are represented at industries' conventions such as SXSW, yet still lack a coherent exports policy for popular music. Moreover it is unclear what support acts might expect on return from such events and I am unaware of any evaluation of the success of Scottish music exports. In Australia the main lesson to be learned came from a lack of cohesion and similar lessons can be learned at the Scottish level.

The example of various youth music projects provides further food for thought. While it appears that the Youth Music Initiative is having some success in encouraging young people to take up a musical instrument (SAC, 2006), there is still more to do. Given the fragility of Scotland's music-related industries' ancillary services, it is important that a taste for these is also developed. The fact that the Australian examples seem also to help with social inclusion provides still more reason for Scotland to investigate them further. Should this be attempted, there will be a further need to retain talent and Australia can provide shared sentiment and examples of successes which, while not always directly aimed at retention, nevertheless have that effect.

Whatever Scottish popular music policymakers decide for the future it is clear that the isolationism which characterises some of the official response cannot continue. This article has argued that the Australian experience - both good and bad - has much to teach Scotland. It is to be hoped that future Ministers holding Summits will seek to look at the southern hemisphere for relevant lessons.

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## Appendix: List organisations and personnel interviewed

ArtsNSW (Victoria Owens, Program Manager, Music), Sydney 7 August 2006.

Arts Queensland (Chris Bowen, Director, Dance and Music and Glenda Johnson, Principal Arts Development Officer, Dance and Music), Brisbane 23 August 2006.

Arts Victoria (Phil Jones, Senior Arts Officer, Touring Victoria), Melbourne, 7 September 2006.

Arts WA (Renee Zaffino, Contemporary Music Project Officer; Marnie Richardson, Communications Officer; and Marty Cunningham, Senior Project Officer, SASP), Perth, 17 August 2006.

Association of Independent Record Labels (Stuart Watters, Executive Officer), Brisbane, 23 August 2006.

Australia Council for the Arts (Kate Lidbetter, Director, Music Board), Sydney, 9 August 2006.

Australia Music Centre (John Davis, General Manager), Sydney, 10 August 2006.

Music Council of Australia (Richard Letts, Executive Director), Sydney, 4 September 2006.

Music New South Wales (Jane Powles, Director Corporate), Sydney, 14 August 2006.

Q Music (Denise Foley, Executive Officer), Brisbane, 24 August 2006.

Western Australia Music (Paul Bodlovich, Chief Executive), Perth, 18 August 2006.

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